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# ***Change Management***

## **Examination Syllabus**

*Version 1.4*

*19 November 2010*

## Introduction

This syllabus is based on the 2<sup>nd</sup> edition of Making Sense of Change Management text by Esther Cameron and Mike Green, issued in January 2009 by Kogan Page and supplementary text from the authors Cameron and Green and the People Alchemy, Alchemy for Managers website. It covers the Foundation and Practitioner levels of examination.

The Cameron and Green book (the 'text') provides guidance on the principles and practice of managing change within organizations and is divided into four separate knowledge chapters: Individual Change, Team Change, Organizational Change and Leading Change. These have been defined as the syllabus areas for the Foundation and Practitioner examinations.

**High Level Performance Definition of a Successful Foundation and Practitioner Candidate**

The standards expected of a Registered Foundation and Practitioner candidate are outlined below.

The breakdown of the subject matter has been undertaken on the basis of two principal levels:

***Foundation***

This level is aiming to measure whether a candidate could act as an informed member of a change management team during a period of change within part or all of their organization.

This is aimed at individuals who require a working knowledge of the key principles of change management, who need to know the terminology used and some of the theory behind the practice. It is also the introduction to the higher level Practitioner qualification.

- Understand the behaviour that individuals, teams and organizations exhibit during change
- Understand the purpose and responsibilities of the roles typically associated with change management
- Understand the approaches to organizational change outlined in the text *Making Sense of Change Management* (2<sup>nd</sup> Edition)
- Understand the concept of leadership and the different behaviours and skills associated with the leadership of change

***Practitioner***

This qualification is aimed at change managers and aspiring change managers demonstrating an understanding of the principles and theory contained in the text supported by practical application and a good general level of understanding. Other key staff involved in the design, development and delivery of change programmes, including: change leaders (e.g. Senior Responsible Owners), change 'agents' (e.g. Business Change Managers), change implementers (e.g. Programme Managers), change support (e.g. Programme Office) and operational line managers/staff would also benefit from the higher level of understanding.

This level is aiming to measure whether a candidate knows how to apply the change management approaches and techniques to the management of change within their organization. To this end they need to exhibit the competence required for the Foundation Change Management qualification, and show that they know how to apply and tailor the approaches and techniques to address the needs and problems of a given change management scenario.

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Specifically:-

- *Know or comment on detailed explanations of all techniques for change explained in the set text (Making Sense of Change Management, 2<sup>nd</sup> Edition) and supplementary texts from the authors and from specific materials referenced on the People Alchemy website.*
- *Demonstrate that they understand the relationships between individual, team and organizational change and can apply this understanding to a change management scenario.*
- *Demonstrate that they understand the concept of leadership and how it can be applied to change management situations.*
- *Demonstrate their ability to apply the change management approaches and techniques to different organizational environments.*

### Syllabus Presentation

Each of the subject areas is presented in a similar format as follows:

1. Syllabus Area            *'Chapter' of the manual/Training Course Module*
2. Syllabus Topic            What the candidate will have to do in order to demonstrate competency in that syllabus area, each syllabus topic describes a specific learning outcome. There are a number of learning outcomes for each syllabus area.  
  
Some of the large level 1 topics have been split into sub-topics covering specific theories or models.
3. Difficulty Level            Classification of the difficulty level of each topic against the OTE Learning Outcomes Assessment Model.

Material to support this syllabus is drawn from 2 main sources which are referenced specifically in this syllabus as follows:

- Where material has been drawn from 'Making Sense of Change Management', Esther Cameron and Mike Green, 2nd Edition, 2008, the page numbers have been included to point to specific tables or paragraphs, or reference is made to a range of pages from which the material is drawn. The majority of the references from this book address the content of level 1 and 2 (the Foundation paper) found in the four chapters of Part One. Specific theories that are not examined in the Foundation or Practitioner papers are indicated. The Practitioner paper also draws on material from the introductions to the book and Part Two; and the two chapters in Part Three.
- Where material has been drawn from additional papers provided by Esther Cameron and Mike Green, or from the People Alchemy Ltd website, references are made to the Practitioner Handbook, where formal copyright statements can be seen.

## Syllabus Areas

Syllabus Area Code	Syllabus Area Title – Change Management
IC	Individual Change
TC	Team Change
OC	Organizational Change
LC	Leading Change

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Syllabus Topic		Syllabus Area : <i>Individual Change</i>	Foundation	Practitioner	Learning Level
<b>Know facts, including terms, concepts, principles, model types, approaches and roles</b> <b>Specifically recall of:</b>					
IC	01	How people learn (P14-19)	√		1
IC	02.1 02.2 02.3 02.4 02.5	Four psychological approaches to change - general (P19 – 50): <ul style="list-style-type: none"> <li>• Behavioural (See Appendix A, Note 1)</li> <li>• Cognitive</li> <li>• Psychodynamic (See Appendix A, Note 2)</li> <li>• Humanistic</li> </ul>	√		1
IC	03	Personality & Change, including familiarisation with MBTI to the extent that Chapter 1 of the text covers it (P50 – 53)	√		1
IC	04	Managing change in self and others (P53 – 58)	√		1
<b>Understand the change management principles, and how they are applied when delivering change programmes.</b> <b>Specifically understanding of:</b>					
IC	05	How managers and change agents use the knowledge of learning styles (Kolb) to help others through change: (Understanding of IC01)	√	√	2
IC	06	How managers and change agents help others through the change process: (Understanding of IC02; IC03; IC04) (Management interventions through the change process P58 – 60)	√	√	2
IC	07	How to support individuals going through change using coaching (GROW model) and supporting techniques: <ul style="list-style-type: none"> <li>• Asking questions</li> <li>• Active listening</li> <li>• Giving feedback</li> </ul> (See Practitioner Handbook)		√	2

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Syllabus Topic		Syllabus Area : <i>Individual Change</i>	Foundation	Practitioner	Learning Level
<b>Apply the change management principles, tailoring them where appropriate to a change management scenario</b> <b>Specifically how to:</b>					
IC	08	Apply knowledge of learning styles (Kolb) to help others through change. (Application of IC01)		√	3
IC	09	Apply knowledge of how managers and change agents help others through the change process. (Application of IC02; IC03; IC04) (Management interventions through the change process P58 – 60)		√	3
IC	10	Apply effective coaching appropriately to a change management scenario using the GROW model and supporting techniques: <ul style="list-style-type: none"> <li>• Asking questions</li> <li>• Active listening</li> <li>• Giving feedback</li> </ul> (See Practitioner Handbook)		√	3
IC	11	Apply knowledge of personality type combinations (from P53) to influence the outcome of an encounter		√	3
<b>Ability to evaluate the appropriateness of the application of change management principles to a change management scenario</b> <b>Specifically evaluation of:</b>					
IC	12	The use of all the above approaches, skills and techniques in an encounter between a manager or change agent and an individual in the change management scenario.		√	4

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Syllabus Topic		Syllabus Area : <i>Team Change</i>	Foundation	Practitioner	Learning Level
<b>Know facts, including terms, concepts, principles, model types, approaches and roles</b> <b>Specifically recall of:</b>					
TC	01	Groups and teams (P63 – 65)	√		1
TC	02	Why we need teams (P65 – 66)	√		1
TC	03	Types of team (P66 – 73)	√		
TC	04	Team effectiveness, Glaser and Glaser five elements (P74 – 77)	√		1
TC	05	Team change, Tuckman (P78 – 82)	√		1
TC	06	Leadership in team change, Bion (P82 – 85) (See Appendix A, Note 3)	√		
TC	07.1 07.2 07.3	How individuals affect team dynamics (P86 – 91) <ul style="list-style-type: none"> <li>• Diversity in teams, McCaulley</li> <li>• MBTI in teams</li> <li>• Belbin’s team types</li> </ul>	√		1
<b>Understand the change management principles, and how they are applied when delivering change programmes</b> <b>Specifically understanding of:</b>					
TC	08	How to improve team effectiveness using the Glaser and Glaser five elements (Understanding of TC04)	√	√	2
TC	09	How managers and change agents help teams to initiate and adapt to organization change (Understanding of TC06)	√	√	2
TC	10	How to improve team effectiveness during change using: <ul style="list-style-type: none"> <li>• The John Adair behaviours model</li> <li>• Facilitation</li> <li>• Action learning</li> </ul> (See Practitioner Handbook)		√	2
TC	11	How to lead teams through their formation and development stages and what interventions to make and when (Understanding of TC04 to TC06, See Practitioner Handbook)		√	2

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Syllabus Topic		Syllabus Area : <i>Team Change</i>	Foundation	Practitioner	Learning Level
<b>Apply the change management principles, tailoring them where appropriate to a change management scenario</b> <b>Specifically how to:</b>					
TC	12	Apply effective use of the Glaser and Glaser five elements appropriately to a change management scenario (Application of TC04)		√	3
TC	13	Apply appropriately to a change management scenario effective use of: <ul style="list-style-type: none"> <li>• The John Adair behaviours model</li> <li>• Facilitation</li> <li>• Action learning</li> </ul> (See Practitioner Handbook)		√	3
TC	14	Apply effective use of team leadership behaviours appropriately to a change management scenario (See Practitioner Handbook)		√	3
<b>Ability to evaluate the appropriateness of the application of change management principles to a change management scenario</b> Specifically evaluation of:					
TC	15	The use of team building and team leadership approaches to help teams to initiate and adapt to organization change in the change management scenario: <ul style="list-style-type: none"> <li>• Glaser and Glaser five elements</li> <li>• John Adair behaviours model</li> <li>• Facilitation</li> <li>• Action learning</li> <li>• Team leadership behaviours</li> </ul>		√	4

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Syllabus Topic		Syllabus Area : <b>Organizational Change</b>	Foundation	Practitioner	Learning Level
<b>Know facts, including terms, concepts, principles, model types, approaches and roles</b> <b>Specifically recall of:</b>					
OC	01	Morgan's organizational metaphors – four key metaphors (P98 – 108)	√		1
OC	02.1 02.2 02.3	Different models of change (P109 – 115) <ul style="list-style-type: none"> <li>Lewin's three-step model</li> <li>Bullock and Batten, phases of planned change</li> <li>Kotter's eight-step model</li> </ul>	√		1
OC	03.1 03.2 03.3 03.4	The dynamics of change (P116 -133 – Except: Cycle of change, Fig. 3.3; Nadler and Tushman; and Carnall, which are not examined at Foundation or Practitioner levels) <ul style="list-style-type: none"> <li>Beckhard and Harris, change formula</li> <li>Bridges, managing the transition</li> <li>Senge et al, systemic model</li> <li>Stacey and Shaw, complex responsive processes</li> </ul>	√		1
<b>Understand the change management principles, and how are applied when delivering change programmes.</b> <b>Specifically understanding of:</b>					
OC	04	How Morgan's Metaphors can be used to improve understanding of organizational change (Understanding of OC01)	√	√	2
OC	05	How different models of change can be used to support organizational change (Understanding of OC02 and OC03)	√	√	2
OC	06	The strategic change process and the essential characteristics of successful strategic change initiatives (P182 – 186)		√	2
OC	07	When change goes wrong and when change goes right (P332 – 338)		√	2
OC	08	Different approaches to getting ready for change (P338 – 342)		√	2
OC	09	The tools that support complex change and when to use them (P321 – 327)		√	2
<b>Apply the change management principles, tailoring them where appropriate to a change management scenario</b> <b>Specifically how to:</b>					
OC	10	Apply Morgan's Metaphors to decide how to approach organizational change in a change management scenario (Application of OC01)		√	3
OC	11	Apply different models of change appropriately to a change management scenario (Application of OC02 and OC03)		√	3
OC	12	Apply the strategic change process and an understanding of the essential characteristics of successful strategic change initiatives appropriately to a change management scenario (P182 – 186)		√	3
OC	13	Apply an understanding of when change goes wrong and when change goes right appropriately to a change management scenario (P332 – 338)		√	3
OC	14	Apply different approaches to getting ready for managing change appropriately to a change management scenario (P338 – 342)		√	3
OC	15	Apply the tools that support complex change appropriately to a change management scenario (P321 – 327)		√	3

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Syllabus Topic		Syllabus Area :	Foundation	Practitioner	Learning Level
		<b>Organizational Change</b>			
<b>Ability to evaluate the appropriateness of the application of change management principles to a change management scenario</b>					
<b>Specifically evaluation of:</b>					
OC	16	The use of different approaches to achieve successful change in change management scenarios for: <ul style="list-style-type: none"> <li>• Organizational change</li> <li>• Strategic change</li> <li>• Complex change</li> </ul>		√	4

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Syllabus Topic		Syllabus Area : <i>Leading change</i>	Foundation	Practitioner	Learning Level
<b>Know facts, including terms, concepts, principles, model types, approaches and roles</b> <b>Specifically recall of:</b>					
LC	01	Links between leadership and organizational metaphors (P139-142)	√		1
LC	02.1 02.2	Different types of leadership (P142-152 – Except: 20 <sup>th</sup> and 21 <sup>st</sup> Century leadership; and Erikson, Table 4.8, which are not examined at Foundation or Practitioner levels) <ul style="list-style-type: none"> <li>• Visionary leadership, Bennis and Kotter; and Transformational leadership, Bryman</li> <li>• Story telling leadership, Gardner; Adaptive leadership, Heifetz and Laurie; and Connective leadership, Jean Lipman-Blumen</li> </ul>	√		1
LC	03.1 03.2	Leadership roles in the change process (P153 – 158) <ul style="list-style-type: none"> <li>• Dispersed leadership, Senge</li> <li>• Four key roles for successful change, O'Neill</li> </ul>	√		1
LC	04	Leadership styles and emotional competencies, Goleman (P159-166)	√		1
LC	05.1 05.2	Different leadership for different phases of change (P166-177 - Inner and Outer leadership; and Erikson not examined at Foundation level) <ul style="list-style-type: none"> <li>• The importance of getting early steps right, Kotter</li> <li>• Learning how to persevere, Rosabeth Moss Kanter; Leading people through transition, Bridges; The role of self-knowledge, Bennis; and Principle-centred leadership, Covey</li> </ul>	√		1
<b>Understand the change management principles and how they are applied when delivering change programmes.</b> <b>Specifically understanding of:</b>					
LC	06	Appropriate leadership types, roles, styles and approaches to meet different organizational change circumstances  (Understanding of LC01 – 05)	√	√	2
LC	07	How to identify and engage stakeholders effectively in a change programme using the SIMSCoM process and the AIDA(S) framework  (See Practitioner Handbook)		√	2
<b>Apply the change management principles, tailoring them where appropriate to a change management scenario</b> <b>Specifically how to:</b>					
LC	08	Apply appropriate leadership types, roles, styles and approaches to meet different organizational change circumstances in a change management scenario  (Application of LC01 – 05)		√	3
LC	09	Apply the SIMSCoM process and the AIDA(S) framework to a change management scenario  (See Practitioner Handbook)		√	3

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<b>Ability to evaluate the appropriateness of the application of change management principles to a change management scenario</b>					
<b>Specifically evaluation of:</b>					
LC	10	The use of leadership in achieving successful change through the selection and adoption of appropriate: <ul style="list-style-type: none"> <li>• Leadership styles and approaches</li> <li>• Stakeholder identification and engagement approaches</li> </ul>		√	4

## APPENDIX A: Notes on Syllabus and Approved Training Materials

The exam panel has reviewed the textbook “Making Sense Of Change Management” (2nd edition) and as a result has held discussions with Mike Green, one of the authors. There are three minor portions of the text which are agreed to be debatable, ambiguous or potentially misleading as printed, and to which we wish to draw ATOs’ attention.

### 1. Page 21, table 1.1

The context of this table is behavioural research on animals by Pavlov, Skinner, Hull and others. Specifically it is based on the ‘reinforcement schedules’ used to elicit ‘conditioned responses’ from animal subjects. In the table, the heading “positive” means “increasing the probability/frequency of desired behaviour” and the heading “negative” means “decreasing the probability/frequency of undesired behaviour”. This leads to four situations:

#### **Positive-Addition (top left cell of the table)**

Here the desired behaviour is deliberately associated with a reward (“positive reinforcement”), so that the behaviour is displayed more frequently.

#### **Positive-Subtraction (bottom left cell of the table)**

Here an unpleasant stimulus previously associated with the desired behaviour is removed, increasing the frequency with which that desired behaviour is displayed. The cell heading “Extinction” is not helpful here, as it is used differently in other textbooks. See ‘Practical Consequences’ below.

#### **Negative-Addition (top right cell of the table)**

Here a punishment is deliberately associated with undesired behaviour, reducing the frequency with which this behaviour is displayed.

#### **Negative-Subtraction (bottom right cell of the table)**

Here a pleasant stimulus previously associated with undesired behaviour is removed, which decreases the frequency of such behaviour. The cell heading “Negative reinforcement” is unhelpful, as other textbooks give this phrase a variety of meanings. See ‘Practical Consequences’ below.

### **PRACTICAL CONSEQUENCES**

1. The notes above are offered in good faith to clarify the context of table 1.1 on page 21. They may be used as aids to training but exam questions will not be based on these notes; the text of the book will remain the basis of such questions.
2. The cell heading “Extinction” in this table is potentially misleading, should not be used in ATO training materials (unless properly qualified) and will not be examined.
3. The cell heading “Negative reinforcement” is used in a variety of ways in other texts. As a result its use as a cell heading in this table is potentially confusing. It should not be used in ATO training materials (unless properly qualified) and will not be examined.

### 2. Page 35 - Adams, Hayes and Hopson’s change curve

There is a layout issue in the text which creates a conflict between the text and the diagram on this page. In describing this version of the change curve, the text uses bullet points for the stages described and begins with “Relief”.

It is true that for some people and some circumstances the shock of the announcement of a change may be mixed with relief. However this is NOT part of Adams, Hayes and Hopson’s model, and “relief” should not be laid out in the text in a way that suggests it is. The diagram at the bottom of page 35 correctly shows the stages of Adams, Hayes and Hopson’s model.

**PRACTICAL CONSEQUENCES**

1. The notes above are offered in good faith to clarify the conflict on page 35 in the text. They may be used as aids to training but exam questions will not be based on these notes; the text of the book will remain the basis of such questions.
2. The idea of “relief” is not part of the Adams, Hayes and Hopson model and will not be examined in this context.

**3. Pages 82-85 The Leadership issues in Team Change**

This section, together with the corresponding line on Bion (1961) on page 79, table 2.4, implies a sequence of stages or phases. Whilst this is a helpful insight, such a definite sequence is not assumed by Bion (1961) or Turquet (1974).

**PRACTICAL CONSEQUENCES**

Whilst we shall examine the content of this section of the book, we shall not make any question depend upon the sequence of Bion's or Turquet's 'basic assumptions'.