



## Clarifying Roles for Successful Change

*(Source: Achieve Global - Change Agent Tool, Daryl Conner, Managing at the Speed of Change, Mary Beth O'Neil, Executive Coaching With Backbone and Heart)*

**What:** Knowing the roles that you and others play in a change initiative is essential to success. Although you may play more than one role within a change, it is critical that you are clear about which role you are enacting at any one time. You must also work within the appropriate boundaries for that role.

There are four key roles necessary for successful and sustained change efforts. These roles tend to cascade down the hierarchy of an organization. They include the roles of Sponsor, Implementer (or Target), Agent and Advocate.

### **Sponsor:**

- the person with the authority to make a change happen.
- has direct authority over the individuals who will implement the action or change;
- has access to and/or control over the resources (money, time and people) needed to implement action or change.
- has a clear vision, identified goals and measurable outcomes for the change initiative;

There are two types of sponsors: 1) **Executive or Initiating Sponsors** – usually the top executives in the organization and 2) **Sustaining Sponsors** – usually those who are responsible for sponsoring the change in their own areas or units. The change may be initiated by an Executive Sponsor and moved forward by the Sustaining Sponsor.

### **Implementer (or Target)**

- The people who are authorized to implement the change (and often are also expected to change something about the way they are doing their work).
- have direct line responsibilities to the Executive or Sustaining sponsor.
- most effective when they clarify their questions and concerns about what is expected with their Sponsor at the beginning of a change

- provide sponsors with information about issues that might block or impede success – thereby providing an essential feedback loop in the system
- requests necessary resources that leverage and reinforce success)

Every Sustaining Sponsor must first be an excellent “implementer or target” with his/her own Executive sponsor.

**Change Agent:**

- can work with both the sponsor and the implementers but does not take on their roles (e.g. functions as a Consultant or Coach)
- can be internal or external to the organizations
- is focused on helping the sponsor and implementers stay aligned with each other
- may act in a number of roles - data gatherer, educator, advisor, facilitator or coach in order to aid sponsors and Implementers in achieving success.
- must be sponsored to work with the Implementers or Targets - has no direct-line authority over the Implementers or Targets.

**Advocate**

- Has a good idea and is in search of a sponsor
- Can occupy any role in the organization
- Most effective if they show how their idea is compatible with issues important to the Sponsors’ change projects and goals

**When:** Use this tool clarify alignment for each change initiative or issue  
Use this tool at the beginning of a change initiative and at critical decision points to map the roles and responsibilities of the people involved.

**Why:** Successful change requires clarity around the roles and authority of those involved. The greater the degree of vertical and horizontal alignment, the greater the chance of success. As a leader involved in a change initiative you can increase alignment by advocating with those involved clarifying the role they are playing.

**How:** Clarify the roles as follows:

- Map the roles (sponsor, implementers, agent, and advocates) relative to the change initiative.
- Get input from others to determine how they see the roles playing out
- Determine if and where there is alignment and misalignment.
- Enact your own role with greater clarity – this will increase alignment in the system involved