

**NATIONAL CERTIFICATE: STRATEGIC MANAGEMENT  
NQF LEVEL 5  
SAQA ID #59201- LEARNING PROGRAMME ID #74512**

**MODULE THREE  
LEADERSHIP, COACHING, SKILLS  
DEVELOPMENT & CHANGE  
MANAGEMENT**



**PORTFOLIO OF  
EVIDENCE**

LEARNER DETAILS	
Name	
Surname	
ID Number	
Group code/ name	

**NATIONAL CERTIFICATE : GENERIC MANAGEMENT  
STRATEGIC MANAGEMENT  
NQF LEVEL 5 : SQI #59201 : LP #74512**

**MODULE THREE  
LEADERSHIP, SKILLS DEVELOPMENT  
AND CHANGE MANAGEMENT**

**PORTFOLIO OF EVIDENCE  
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## LEARNER DECLARATION OF AUTHENTICITY

I, \_\_\_\_\_  
(name and surname)

agree to, and will abide, by the following conditions:

- 1) I will complete all documentation as required.
- 2) All activities and tasks will be completed to the best of my abilities.
- 3) All the work I submit will be my own work.
- 4) I can only be credited for the unit standards in this module if I hand in my workbook within the specified time frame.
- 5) Should I lose this workbook, I will cover the costs to replace it and will redo all my work. I will arrange with the facilitator how to do this.
- 6) I will comply with the skills development provider's learner code of conduct.

<b>Learner signature</b>		<b>Date</b>	
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## UNIT STANDARDS : AN OVERVIEW

Unit Standard ID		Title	NQF Level	Credits
Fundamental	120300	Analyse leadership and related theories in a work context.	5	8
<b>Specific outcomes</b> <ol style="list-style-type: none"> <li>1. Explain the concept of leadership.</li> <li>2. Differentiate between leadership and management.</li> <li>3. Analyse leadership theories.</li> <li>4. Apply the different roles and qualities of leadership in a work context.</li> </ol>				
Unit Standard ID		Title	NQF Level	Credits
Core	252043	Manage a diverse work force to add value.	5	6
<b>Specific outcomes</b> <ol style="list-style-type: none"> <li>1. Demonstrate knowledge and understanding of diversity in the workplace.</li> <li>2. Demonstrate understanding of the reality of diversity and its value in a unit.</li> <li>3. Manage team members taking into account similarities and differences.</li> <li>4. Deal with disagreements and conflicts arising from diversity in a unit.</li> </ol>				
Unit Standard ID		Title	NQF Level	Credits
Core	252029	Lead people development and talent management.	5	8
<b>Specific outcomes</b> <ol style="list-style-type: none"> <li>1. Analyse education, training and development needs of members of a unit.</li> <li>2. Record the results of the training needs analysis.</li> <li>3. Compile a people development plan for a unit.</li> <li>4. Manage the implementation of the people development plan of a unit.</li> </ol>				
Unit Standard ID		Title	NQF Level	Credits
Core	252035	Select and coach first line managers.	5	8
<b>Specific outcomes</b> <ol style="list-style-type: none"> <li>1. Select first line manager for a specific position.</li> <li>2. Plan the coaching process of a first line manager.</li> <li>3. Coach selected first line manager.</li> <li>4. Monitor and measure the results of coaching sessions.</li> </ol>				

continued...

Unit Standard ID		Title	NQF Level	Credits
Core	252021	Formulate recommendations for a change process.	5	8
<b>Specific outcomes</b> <ol style="list-style-type: none"> <li>1. Demonstrate knowledge of and insight into the need for change within the context of environment change.</li> <li>2. Analyse an area requiring the implementation of a change process.</li> <li>3. Select a model for implementing a change management process.</li> <li>4. Formulate recommendations on implementing the change process.</li> </ol>				

EXIT LEVEL OUTCOMES
<ol style="list-style-type: none"> <li>1. Initiate, develop, implement and evaluate operational strategies, projects and action plans so as to improve the effectiveness of the unit.</li> <li>2. Monitor and measure performance and apply continuous or innovative improvement interventions in the unit.</li> <li>6. Enhance the development of teams and team members.</li> </ol>

ASSOCIATED ASSESSMENT CRITERIA
<ul style="list-style-type: none"> <li>• Priorities are identified by considering a broad range of factors in solving problems and making decisions on operational strategies.</li> <li>• The need for and the benefits of change are explained and recommendations are made to achieve intended results.</li> <li>• Operational strategies, projects and action plans are initiated and developed.</li> <li>• Operational strategies, projects and action plans are implemented and evaluated.</li> <li>• The talents of each team member are evaluated according to the needs and operational requirements of the unit.</li> <li>• The team is provided with direction towards fulfilment of organisational goals.</li> <li>• Resources are identified and used by the leader to accomplish the objectives of the unit.</li> <li>• The acquisition and enhancement of skills is facilitated through people development processes.</li> <li>• Direction is given to first line managers on their possible career progression within the entity through coaching and other personal interaction.</li> <li>• The diversity in the team is recognised and harnessed in order to add value to team effectiveness.</li> </ul>

## CRITICAL CROSS-FIELD OUTCOMES (INTEGRATED)

Identify and solve problems using critical and creative thinking processes...

- To interpret how leadership theories, roles and values are applied to own work context.
- Relating to conflict, disagreements and discrimination relating to diversity.
- In which responses show that responsible decisions have been made in relation to people development processes in a unit.
- Relating to the implementation of a coaching process.
- In which responses show that responsible decisions have been made in relation to the recommendations made for change process for a unit.

Work effectively with others as a member of a team, group, organisation or community...

- To determine leadership needs within own context.
- In developing and implementing solutions.
- In planning, promoting and managing the implementation of people development processes in a unit.
- During coaching sessions with a first line manager.
- In promoting a change process in a unit.

Organise and manage oneself and one's activities responsibly and effectively...

- In order to ensure proactive leadership.
- When dealing with team members in managing diversity in a unit.
- In planning and managing the implementation of people development processes in a unit.
- In preparing a coaching schedule.
- In relation to the recommended change process for a unit.

Collect, analyse, organise, critically evaluate and apply information...

- In order to apply the roles of leadership in different work contexts.
- On the nature of diversity in a unit.
- In relation to compiling a people development plan for a unit.
- Concerning applicants for a position.
- In formulating recommendations on a change process for a unit.

Communicate effectively using visual, mathematical and/or language in the modes of oral and/or written persuasion...

To lead effectively when...

- Dealing with conflict and disagreements arising from diversity in a unit.
- Communicating with all stakeholders on the people development plan of a unit.
- Explaining the coaching purpose and process.
- Formulating recommendations on a change process for a unit.

Demonstrate an understanding of the world as a set of interrelated systems by...

- Recognising that problem-solving contexts relating to leadership do not exist in isolation and that varying factors will impact on leadership.
- Recognising the complexity of diversity.
- Recognising that problem-solving contexts do not exist in isolation in applying knowledge of and insight into people development processes and talent management in a unit.
- Guiding the first line manager to understand the interrelationship between work processes.
- Recognising that problem-solving contexts do not exist in isolation in applying knowledge of and insight into the complexity of change processes.
- Contribute to the full personal development of self by being culturally and aesthetically sensitive across a range of social contexts when dealing with diversity in a unit.

**continued...**

## FORMATIVE ACTIVITIES

**US120300: Analyse leadership and related theories in a work context**

**SO1:** Explain the concept of leadership. ACs 1-2

**SO2:** Differentiate between leadership and management. ACs 1-4

**SO3:** Analyse leadership theories. ACs 1-3

**SO4:** Apply the different roles and qualities of leadership in a work context. ACs 1-5

### FORMATIVE ACTIVITY 1: STRATEGIC MANAGEMENT AND STRATEGIC LEADERSHIP

1. In the Autumn Issue of Strategy+Business, researchers state that organisations worldwide are experiencing a “critical deficit” in strategic leadership.

- 1.1 Differentiate between leadership, strategic leadership and strategic management.

Leadership	Strategic leadership	Strategic management

- 1.2 Explain one (1) workplace example that demonstrates your **strategic leadership** ability.

- 1.3 Describe if you are mostly involved in strategic management functions or strategic leadership functions in your workplace.

2. No matter what organisation, business unit, or department you work in, you are a role model (either good or bad) for your team.

This is because it is your values, attitude, and actions, and not specifically your policies or guidelines, that influence your team.

- 2.1 Explain, in at least three (3) sentences, the term role model in an organisational context.

- 2.2 Discuss if you think you are (or are not) a leadership role model for your team.

Use workplace examples of the four (4) **characteristics of a role model** to support your discussion.



3. Leadership theories can assist in identifying the behaviours to improve leadership abilities in different situations.

Name and analyse (including an advantage and disadvantage) the leadership theory that Asheel, The Operations Strategic Manager, can put in to practice in the following team contexts.

- 3.1 Managing a team involving sharing power and decision-making to achieve business objectives.

- 3.2 Managing a team to develop innovative thinking and adaptability to constant change.

3. Leadership theories can assist in identifying the behaviours to improve leadership abilities in different situations.

Name and analyse (including an advantage and disadvantage) the leadership theory that Asheel, The Operations Strategic Manager, can put in to practice in the following team contexts ... **continued.**

- 3.3 Managing a team employing a leadership style related to the team's ability and experience.

- 3.4 Managing a team using effective leadership qualities associated with credibility (such as being honest, progressive, inspiring, and competent).

4. Explain, using workplace examples, how you do (or do not) put in to practice/apply:

4.1 The **nine (9) roles** of strategic leadership.

4.2 The **seven (7) qualities** of strategic leadership.

**SUMMATIVE TASK**  
**To be performed in own time and/or at the workplace.**

**US120300: Analyse leadership and related theories in a work context**

**SO1:** Explain the concept of leadership. ACs 1-2

**SO2:** Differentiate between leadership and management. ACs 1-4

**SO3:** Analyse leadership theories. ACs 1-3

**SO4:** Apply the different roles and qualities of leadership in a work context. ACs 1-5

**GROUP SUMMATIVE TASK 1**  
**STRATEGIC MANAGEMENT AND LEADERSHIP**

1. Strategic leadership is an enormous responsibility. These leaders need to think critically, inspire others, challenge their own and the worldview of others, and be up-to-date about the changing political, economic, social, technological, legal, and environmental South African landscape to assist the organisation to achieve the strategic vision and goal.

In a team, create and deliver a **15 minute presentation** to the Module 3 Facilitator that addresses the following questions:

- 1.1 Identify who you think is an effective or successful leader in your organisation.

Motivate, using workplace examples, your choice based on the following:

- Strategic leader or strategic manager.
- Leadership roles.
- A leadership theory that describes their leadership approach.

- 1.2 Justify, using workplace examples, the leadership qualities you consider to be the most important to be an effective strategic leader in your organisation.

**IMPORTANT:**

Attach your **group presentation** in either PowerPoint or Adobe Acrobat PDF and submit with this summative assessment.

Include the name and surname of each member of your group in the presentation.

You will label this “**Group Name SM5 M3 GS Task 1**”.

## FORMATIVE ACTIVITIES

### US252043: Manage a diverse work force to add value

**SO1:** Demonstrate knowledge and understanding of diversity in the workplace. ACs 1-4

**SO2:** Demonstrate understanding of the reality of diversity and its value in a unit. ACs 1-4

**SO3:** Manage team members taking into account similarities and differences. ACs 1-4

**SO4:** Deal with disagreements and conflicts arising from diversity in a unit. ACs 1-3

### FORMATIVE ACTIVITY 2: DIVERSITY AND DIVERSITY MANAGEMENT IN THE WORKPLACE

1. Read the following scenario and answer the questions:

My Learning and Development Manager, Gugu, told me in private that we will not hire one of our interviewees, Mpilo, for the Facilitator role.

She said this is because she thinks his voice is too high-pitched, and she thinks he is gay. Gugu said the learners, and the other team members, will not get along with him.

I confronted Gugu, because I think this is workplace discrimination.

- 1.1 Discuss your understanding of workplace diversity.

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- 1.2 There are different types of workplace diversity.

Name and explain the type of workplace diversity that Gugu is not encouraging in this question 1 scenario.

<b>Name the type of workplace diversity</b>
<b>Explain the type of workplace diversity</b>

1.3 There are many benefits of diversity in the workplace.

Describe any four (4) benefits of diversity in the workplace that Gugu, in question 1, will not afford her team if she doesn't hire Mpilo.

1.4 Explain workplace discrimination, and share the example of workplace discrimination in the question 1 scenario.

<b>Explain workplace discrimination</b>
<b>Example of workplace discrimination in the question 1 scenario</b>

- 1.5 Briefly differentiate between fair and unfair discrimination, and explain if this question 1 scenario is an example of fair or unfair discrimination.

Fair discrimination	Unfair discrimination
<b>Explain if the question 1 scenario is an example of fair or unfair discrimination.</b>	

- 1.6 Discuss three (3) strategies you would implement to ensure diversity and inclusion are practiced in this Learning and Development department in scenario 1.

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2. Simon manages a diverse team of employees. Their team meetings take place every Friday from 12.00-13.00. Abdul, the Muslim team member, is unable to attend these meetings because he goes to the Mosque to pray.

Abdul asked Simon if he can move these meetings to later in the afternoon as he wants to participate. Simon said this is the only time available, so Abdul must catch up from the others.

This made Abdul feel excluded, and they began arguing.

- 2.1 Explain diversity management in your own words.

- 2.2 Do you (or do you not) manage diversity in your team? Justify your reasoning using a workplace example or examples.

- 2.3 There are four skills suggested to lead diverse teams.

- 2.3.1 List the four (4) skills Simon requires to lead the diverse team in the question 2 scenario.

- 2.3.2 Identify one (1) skill (from question 2.3.1) to manage a diverse team that you want to personally improve, and explain how you aim to do this.



2.4 There are five frequent causes of diversity-related disagreements.

Identify and discuss the reason or cause for the diversity-related disagreement in the question 2 scenario.

3. “After allegations of a work culture where sexual discrimination and harassment ran rampant, Uber’s former CEO and co-founder, Travis Kalanick, was forced to resign in June 2017.

Twenty employees were dismissed after an investigation found they failed to address some of the 215 cases of reported sexual harassment, bullying, retaliation, and bias, and a board member was forced to resign after making a sexist joke in a meeting – which was called to address Uber’s sexist culture.”

- 3.1 Suggest **diversity-related conflict management strategies** that Uber should have executed to avoid this from happening.

Refer to the question 3 Uber scenario to support your descriptions.

**SUMMATIVE TASK**  
**To be performed in own time and/or at the workplace.**

**US252043: Manage a diverse work force to add value**

**SO1:** Demonstrate knowledge and understanding of diversity in the workplace. ACs 1-4

**SO2:** Demonstrate understanding of the reality of diversity and its value in a unit. ACs 1-4

**SO3:** Manage team members taking into account similarities and differences. ACs 1-4

**SO4:** Deal with disagreements and conflicts arising from diversity in a unit. ACs 1-3

**INDIVIDUAL SUMMATIVE TASK 2**  
**DIVERSITY AND DIVERSITY MANAGEMENT**

2. The diverse workplace, in South Africa and internationally, is reflective of our improved understanding and celebration of our diverse social realities. A diverse workplace encourages many positive benefits for an organisation, but also results in negative effects as well.

Write an **informal feedback report**, maximum two (2) pages, that addresses the following:

- 2.1 Conduct online research on the positive and negative effects of diversity.

Discuss the positive and negative effects of diversity that you have personally experienced in your team, department, and/or organisation.

- 2.2 Describe an *incident\** of a diversity-related disagreement, conflict or discrimination that has occurred in your team, department, or organisation.

*\*Keep the names and surnames of those involved in the incident confidential. For example, employee A and employee B.*

- 2.3 Referring to what you have learnt about diversity and diversity management, explain how you would address this incident in question 2.2.

**IMPORTANT:**

Attach your **feedback report** in either Microsoft Word or Adobe Acrobat PDF and submit with this summative assessment.

You will label this “**Name and Surname SM5 M3 IS Task 2**”.

## FORMATIVE ACTIVITIES

### US252029: Lead people development and talent management

**SO1:** Analyse education, training and development needs of members of a unit. ACs 1-4

**SO2:** Record the results of the training needs analysis. ACs 1-4

**SO3:** Compile a people development plan for a unit. ACs 1-6

**SO4:** Manage the implementation of the people development plan of a unit. ACs 2-3

### FORMATIVE ACTIVITY 3: TRAINING, PEOPLE DEVELOPMENT, AND TRAINING NEEDS ANALYSIS (TNA)

1. Before you can analyse the education, training, and development needs of your department, as the strategic manager you need to familiarise yourself with skills-development in a South African context.

- Explain (2-4 sentences each) the following aspects of skills development, and
- Describe how each is implemented (or not) in your organisation's training and people development.

#### 1.1 Skills Development Act

#### 1.2 Skills Development Levies Act

#### 1.3 Employment Equity Act

1. Before you can analyse the education, training, and development needs of your department, as the strategic manager you need to familiarise yourself with skills-development in a South African context.

- Explain (2-4 sentences each) the following aspects of skills development, and
- Describe how each is implemented (or not) in your organisation's training and people development ... **continued.**

1.4 The B-BBEE scorecard

1.5 South African Skills development quality councils

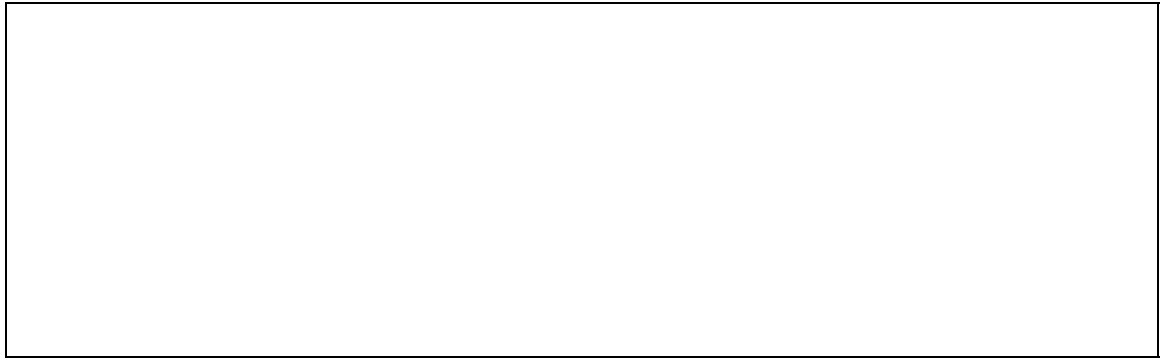
1.6 National Qualifications Framework (NQF)

1.7 Lifelong learning

1. Before you can analyse the education, training, and development needs of your department, as the strategic manager you need to familiarise yourself with skills-development in a South African context. **(continued...)**

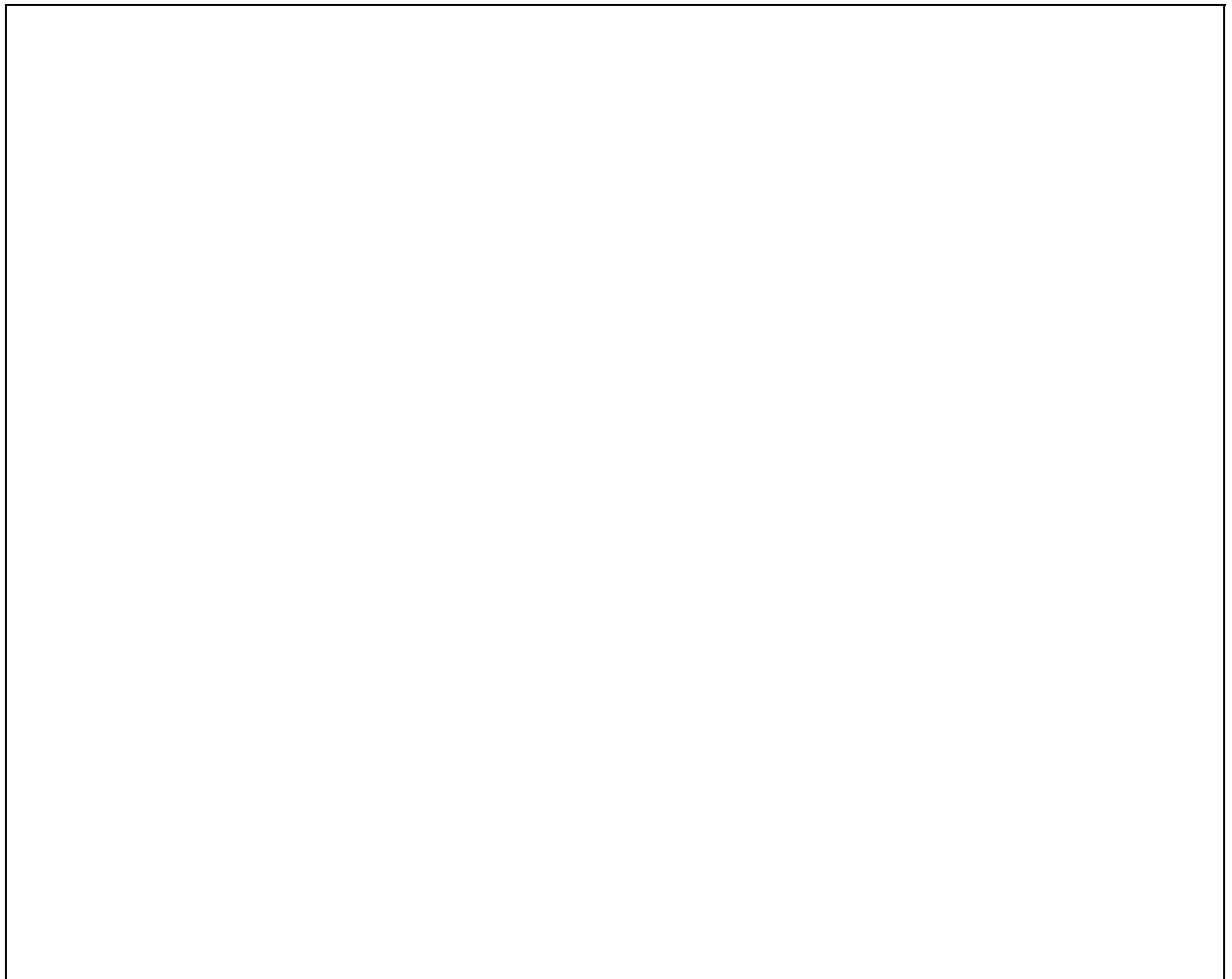
- Explain (2-4 sentences each) the following aspects of skills development, and
- Describe how each is implemented (or not) in your organisation's training and people development ... **continued.**

#### 1.8 Outcomes-based learning



2. Justify the skills development learning programmes that are implemented in your organisation.

Share a workplace example to support each justification.



3. Organisations worldwide recognise the importance of employee training, and with that same enthusiasm jump right in. The issue is jumping in often results in missing an important first step.

This important first step is working with Human Resources and/or Training and Development to conduct a Training Needs Analysis (TNA).

3.1 Define a TNA in your own words as much as possible.

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3.2 Briefly explain three (3) types of TNAs, and motivate what type or types you believe are needed in your department.

<b>Three (3) types of TNAs</b>
<b>Motivate the type or types needed in your department.</b>

3.3 Explain, using workplace examples, the TNA data collection method or methods you personally use in your department and/or organisation.

3.4 The results of a TNA are recorded in a TNA report. Explain the purpose of a TNA report.

4. Employee development plans help address future business needs, and provide your team members with opportunities and clear directions about how to improve their skills and advance their careers.

- 4.1 Describe the purpose of an Employee Development Plan (EDP) and explain what an EDP includes in your organisation.

Purpose of an EDP
What an EDP includes in your organisation

- 4.2 Discuss (using workplace examples) how you, as a strategic manager, ensure your employee development plans are well prepared and effective.

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**SUMMATIVE TASK**  
**To be performed in own time and/or at the workplace.**

**US252029: Lead people development and talent management**

**SO1:** Analyse education, training and development needs of members of a unit. ACs 1-4

**SO2:** Record the results of the training needs analysis. ACs 1-4

**SO3:** Compile a people development plan for a unit. ACs 1-6

**SO4:** Manage the implementation of the people development plan of a unit. ACs 2-3

**INDIVIDUAL SUMMATIVE TASK 3**  
**ANALYSE TRAINING AND EMPLOYEE DEVELOPMENT NEEDS**

3. Richard Branson is well-known for saying “clients do not come first. Employees come first”. This highlights the value of training needs analysis and people development in your organisation, because this is about investing in your people or employees. When this is done effectively, the organisation will achieve success and customer satisfaction.

3.1 Conduct a **knowledge and/or skills training needs analysis (TNA)** for your team, and share the findings in a **TNA report**.

**The TNA report must include the following sections:**

- Executive summary
- Introduction
- Scope
- Purpose
- Limitations
- Methodology  
e.g. the TNA methods used to collect information here
- Findings
- Conclusion
- Recommendations
- Appendix  
e.g. Training Needs Analysis Excel document

3.2 Select one (1) team member and submit a detailed **Employee Development Plan (EDP)**, using your organisation’s EDP format, to demonstrate your understanding.

**IMPORTANT:**

Attach your **TNA report** and **EDP** as one document in either Microsoft Word or Adobe Acrobat PDF and submit with this summative assessment.

You will label this “**Name and Surname SM5 M3 IS Task 3**”.

## FORMATIVE ACTIVITIES

### US252035: Select and coach first line managers

**SO1:** Select a first line manager for a specific position. ACs 1-5

**SO2:** Plan the coaching process of a first line manager. ACs 1-3

**SO3:** Coach selected first line manager. ACs 1-4

**SO4:** Monitor and measure the results of coaching sessions. ACs 1-5

### FORMATIVE ACTIVITY 4: SELECTING AND COACHING FIRST LINE MANAGERS

1. There are many levels of managers within an organisation, and first-line managers are often described as the “glue that holds the business together”.

1.1 Provide an example of a first line manager role in your organisation.

1.2 Motivate why this role in question 1.1 is classified as a first line manager.

2. Step one in selecting a first line manager is to provide a job description. This is a shared responsibility between the strategic manager and Human Resources (HR).

Source a first-line manager job description in your organisation, and provide examples of the following elements:

2.1 Job title

2.2 Reporting relationship

2.3 Job description

2. Step one in selecting a first line manager is to provide a job description. This is a shared responsibility between the strategic manager and Human Resources (HR).

Source a first-line manager job description in your organisation, and provide examples of the following elements ... **continued.**

2.4 Education or qualifications

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2.5 Experience

--

2.6 Responsibilities

--

2.7 Skills

--

2.8 Circumstances e.g. travel required

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3. Step two in selecting a first line manager involves sourcing appropriate candidates.

Explain (using examples) the sourcing methods you feel are most suitable to find first-line managers for your department.

4. Step three in selecting a first line manager is about tracking applications.

Briefly describe what this involves, and identify the tracking system or systems your organisation uses.

5. Step four in selecting a first line manager includes shortlisting candidates.

- 5.1 Explain the recommendations when short-listing candidates.

- 5.2 Explain the criteria for short-listing candidates. Support your explanation using an example from the job description in question 2.

6. Step five in selecting a first line manager comprises conducting interviews.

6.1 List the main elements in the (3) part process to consider when conducting interviews in your organisation.

7. Step six in selecting a first line manager is the most important and overwhelming step, and this is to select the best candidate.

Discuss the five (5) aspects to consider when selecting the best candidate to be a first line manager for the job description provided in question 2.

8. Step seven, and the last step, in selecting a first line manager is to make an offer to the best candidate.

Briefly explain who is responsible for making an offer in your department, and how that person does this.

9. Coaching is a two-way street as both parties (the coach and the coachee) are influenced by one another, and experience growth and development as a result.

In this table, briefly differentiate between the role of the coach and coachee.

Coach	Coachee

10. Explain a coaching plan, and describe how you would develop a coaching plan for a first-line manager in your department.

Explain a coaching plan
Describe how you would develop a coaching plan for a first line manager in your department

11. One of your employees of the last five years, Andile, recently shared with you that she is interested in a promotion to Software Quality Assurance Manager for the new team starting next month. From experience, you know she can be a first-line manager, but there is a crucial skill related to team management that she must develop to perform effectively in this role.

The Key Results Area (KRA) that Andile must develop is her time management to ensure the team meet their project deadlines.

To assist Andile to achieve her career goal, you set up the first GROW coaching session with her.

Discuss, using the **GROW model**, how you will structure your first coaching session with Andile as a potential first-line manager for this new team.

**SUMMATIVE TASK**  
**To be performed in own time and/or at the workplace.**

**US252035: Select and coach first line managers**

**SO1:** Select a first line manager for a specific position. ACs 1-5

**SO2:** Plan the coaching process of a first line manager. ACs 1-3

**SO3:** Coach selected first line manager. ACs 1-4

**SO4:** Monitor and measure the results of coaching sessions. ACs 1-5

**INDIVIDUAL SUMMATIVE TASK 4**  
**SELECT AND COACH FIRST LINE MANAGERS**

4. According to the Training Journal, the role in your organisation that has the biggest impact on the bottom line is the first line manager. The reason for this is “the first line manager has the greatest impact on frontline staff, and they can make or break the business. Without effective first line managers, it’s almost impossible for your organisation to thrive”.

Write an **informal report** related to selecting and coaching a first line manager that includes the following four sections:

- 4.1 Evaluate your involvement, and your organisation's process, in selecting a candidate for a recent first line manager position.

Describe what is done well, and/or what can be improved in each step.

- 4.2 Create a first line manager **coaching plan** with an identified team member or colleague.

- 4.3 Conduct **two (2) coaching sessions** with this first line manager, either on-site or online, and share your feedback from these two sessions.

- 4.4 Measure if there has been (or has not been) an improvement in the team member working towards achieving their goal from session one to session two.

**IMPORTANT:**

Attach your **evaluation, coaching plan**, and **coaching session feedback** in either Microsoft Word or Adobe Acrobat PDF and submit with this summative assessment.

You will label this “**Name and Surname SM5 M3 IS Task 4**”.



## FORMATIVE ACTIVITIES

**US252021: Formulate recommendations for a change process**

**SO1:** Demonstrate knowledge of and insight into the need for change within the context of environment change. ACs 1-2

**SO2:** Analyse an area requiring the implementation of a change process. ACs 1-2

**SO3:** Select a model for implementing a change management process. ACs 1-2

**SO4:** Formulate recommendations on implementing the change process. ACs 1-3

## FORMATIVE ACTIVITY 5: ORGANISATIONAL CHANGE AND IMPLEMENTING THE CHANGE PROCESS

1. According to Gartner, the world's leading business and technology research and advisory company, "change is the new constant". This is because most organisations today have experienced at least five major changes in the past three years. "Yet, half of these change initiatives failed, and only 34% were successful."

- 1.1 Explain, in one (1) paragraph, the concept of organisational change, and share an example of recent organisational change you experienced in your department or organisation.

<b>Explain organisational change</b>
<b>Example of organisational change you experienced</b>

- ## 1.2 Change has many benefits for an organisation.

Describe the benefits of the organisational change in question 1.1.

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1. According to Gartner, the world's leading business and technology research and advisory company, "change is the new constant". This is because most organisations today have experienced at least five major changes in the past three years. "Yet, half of these change initiatives failed, and only 34% were successful" ... **continued.**

1.3 There are two main types of organisational change being internal and external.

Refer to the organisational change example you provided in question 1.1, and explain if this is an example of internal and/or external organisational change.

- 1.4 Define change management, and explain why this is a critical leadership function in your organisation.

<b>Define change management</b>
<b>Explain why change management is a critical leadership function in your organisation</b>

1. According to Gartner, the world's leading business and technology research and advisory company, "change is the new constant". This is because most organisations today have experienced at least five major changes in the past three years. "Yet, half of these change initiatives failed, and only 34% were successful" ... **continued.**

- 1.5 Since every organisation has different values, goals, change objectives, and culture, not every change management model can apply in each organisation.

Discuss, using workplace examples, the change management model that you would have followed to implement the organisational change example in question 1.1.

2. Briefly explain each step to implement a change management plan, and relate each step to the **Netflix case study**:

- Define the change and align it to business goals.
- Appoint a change management team.
- Determine impact and those affected.
- Develop a communication strategy.
- Provide effective training.
- Develop a change resistance management plan.
- Implement a support structure.
- Measure the change process.

## **CASE STUDY**

### **Netflix Trusts Its Digital Plan**

Andrew Conrad – Capterra Blog

Netflix launched in 1998 as a DVD mailing service in the United States of America (USA). Users curated a film queue, and the company mailed DVDs to their homes, in order, upon return of each disc. It was a great business model for the late 90s and early 2000s. Netflix gained hundreds of thousands of subscribers and went public in 2002.

But entertainment changed, and the way consumers watched it changed too. If Netflix had continued to mail out fragile physical discs in envelopes, its growth would have stagnated due to external factors such as the capabilities of the U.S. postal service, the lifespan of the DVD format, and its physical inventory.

Netflix was at a crossroads, and its long-term sustainability depended on how it managed the change to a digital future.

Netflix CEO Reed Hastings knew that DVDs were on their way out, and for his company to succeed he needed to shift gears and adapt to the digital future. In February 2009, he told Bloomberg: “We’ve got one singular objective, which is ‘Be successful in streaming.’ If we do that, that’s a home run.”

But the company’s change management got off to a rocky start. Customers were initially outraged by the announcement that Netflix would be charging separate fees for digital streaming and DVDs, and 800 000 ditched the service in late 2011. Netflix stock dropped by 77% in only four months.

Despite the initial turbulence, Netflix leaders remained committed to the change. Management closed ranks to form a united front, and the company continued to pour resources into digital streaming and original programming.

Netflix subscribers grew from 23 million in 2011 to 222 million subscribers in 2021. Today, Netflix services are available for streaming in 190 countries worldwide.

2. Briefly explain each step to implement a change management plan, and relate each step to the **Netflix case study ... continued.**

**SUMMATIVE TASK**  
**To be performed in own time and/or at the workplace.**

**US252021: Formulate recommendations for a change process**

**SO1:** Demonstrate knowledge of and insight into the need for change within the context of environment change. ACs 1-2

**SO2:** Analyse an area requiring the implementation of a change process. ACs 1-2

**SO3:** Select a model for implementing a change management process. ACs 1-2

**SO4:** Formulate recommendations on implementing the change process. ACs 1-3

**GROUP SUMMATIVE TASK 5**  
**CREATE A CHANGE MANAGEMENT PLAN**

5. Driving and inspiring change is a challenge that most organisations are currently facing. The times when stability and predictability were the main business priorities are over.

Using your theoretical knowledge of organisational change and change management, present a change management plan for your department or organisation.

This **change management plan** must address the following:

- 5.1 Identify a model that you could use in the implementation of this change management process, and explain why you want to use that model.
- 5.2 Explain your team's proposed change management plan using the following steps:
- Define the change and align it to your organisation's goals.
  - Propose a change management team.
  - Determine the possible impact and those affected.
  - Suggest a communication strategy.
  - Propose effective training.
  - Offer a change resistance management plan.
  - Recommend a support structure.
  - Measure the change process.

**IMPORTANT:**

Attach your **change management plan** in either PowerPoint or Adobe Acrobat PDF and submit with this summative assessment.

You will label this "**Group Name SM5 M3 GS Task 5**".