



The Leadership Toolkit - Holding up the Mirror NHS Grampian



CHANGE HAPPENS WITH ME

**Progress is impossible without change, and
those who cannot change their minds cannot
change anything**
— **George Bernard Shaw**

NHS Grampian champions values and behaviours which are critical to help provide a healthy working culture. These values and behaviours should be embedded in everything we do.

By utilising this toolkit, you are holding up a ‘mirror’ to yourself and your leadership practises. You will reflect through helpful exercises, exploring key theories and approaches and deepen your understanding of how personal values align with those of our organisation.


The aim is to promote self-awareness which enhances your ability to lead through change but also strengthens relationships within your team. Having a greater understanding of yourself is beneficial as it fosters greater understanding of others and leads to creating more productive working relationships and positive team dynamics.

Part two of this toolkit will work to support your team to have greater working relationships and productivity.




Table of Contents

Section	Chapter	Page
Introduction	Maximising the Value of this Toolkit Why is it important to think about leadership	<u>4</u> <u>4</u>
Understanding Self	Gibbs Reflective Cycle Johari Window Daniel Goleman's Emotional Intelligence 360 feedback Additional Resources	<u>6</u> <u>8</u> <u>10</u> <u>11</u> <u>12</u>
Leading Self	Leading Self What helps leaders to manage their feelings?	<u>13</u> <u>14</u>
Leading Others	Leading Others Situational Leadership Goleman's Leadership Styles Action Centred Leadership Covey's Time Management Matrix	<u>15</u> <u>16</u> <u>18</u> <u>20</u> <u>25</u>
Leading to Change	Leading to Change Introduction to Change Change is Emotional The process of transition Begin with the end in mind Resistance to Change	<u>27</u> <u>31</u> <u>32</u> <u>32</u> <u>34</u> <u>35</u>
	Coaching	<u>41</u>
	Mentoring	<u>42</u>
	How do you sustain yourself?	<u>43</u>
	Appendices	<u>44</u>



People led management delivers transformational change



Maximising the Value of this Toolkit

This toolkit is designed to support leaders and managers within NHS Grampian in their ongoing development and has been produced for a reflective, self- led learning resource. Use it to reflect on your current management practice and explore sections most relevant to you.

Short, focused sessions can be particularly effective.

Regardless of your level of experience, you will find valuable resources to enhance your practice.

Each topic includes:

- An introduction to a theory/model.
- Activities you can use for self-reflection and/or to support group discussions.

Your experience is likely to be enriched by connecting with other leaders and making time to discuss your learning and how it links to day to day practise.

The Management Development Forum is an excellent resource to link with peers to do this and you can join [here](#).

Following on from this Development Toolkit for Leaders and Managers, there is a Development Toolkit for Teams which will enhance culture and support change.

If you read through this material and would like to discuss the content and/or explore options for facilitative support, please contact the Wellbeing, Culture and Development Team at gram.wcd@nhs.scot

Why is it important to think about leadership?

Leadership is “a process of social influence in which a person can enlist the aid and support of others in the accomplishment of a common task” Martin Chemers.

Drew Dudley speaks about how important this is in [Everyday leadership](#).

Click link in image to view video.



Leadership is available from everyone - anyone can offer leadership in a group; and some people have a responsibility to do so. Delivering high quality, cost effective health care services to the patient is the task we are all here to do, whether clinically, or non-clinically.

One of the key challenges and opportunities for those leading will be to identify and harness the best of what each member of the team can offer, and to create the right opportunities for these skills, approaches, qualities and accumulated knowledge to become embedded in the new identity and practice in the team.

In a health service which has become increasingly more complex in terms of partnerships, governance and patient acuity, Stephen Covey writes “seek first to understand, and then to be understood”.

You will find resources throughout this toolkit to support competency in

- *adapting communication skills*
- *defining a clear vision*
- *encouraging ‘good’ conversations*
- *acknowledging strengths already present in yourself*
- *being confident in supporting and managing change*
- *prioritising team learning and development*
- *being self-aware*
- *promoting equality amongst team members*
- *supporting reflection, curiosity and inquiry*



Understanding Self

Understanding yourself is one of the best ways you can support your growth as a leader and support your team. There are a number of tools and exercises available.

Gibbs Reflective Cycle

A tool which can be used to develop self reflection is the Gibbs' Reflective Cycle. It is a practical, six-stage model that guides individuals through structured reflection on experiences.

Gibbs Reflective Cycle



Its cyclical nature encourages continuous improvement by revisiting experiences, exploring emotions and outcomes, and applying insights to future actions. It's especially valuable in coaching, mentoring, and quality improvement, helping individuals learn from mistakes and enhance their practice.



Reflection Activity

Description - think of a situation in your leadership role you would like to reflect on.

- *What was the situation?*
- *Who was involved?*
- *What did you do?*

Feelings- What were you thinking and feeling?

- *How did you feel at the time?*
- *What were your initial thoughts?*
- *Did your feelings change during or after the experience?*

Evaluation- What was good and bad about the experience?

- *What went well?*
- *What did not go so well?*
- *How did others respond?*

Analysis- What sense can you make of the situation?

- *Why did things happen the way they did?*
- *What helped or hindered the outcome?*
- *What can you learn from this?*

Conclusion- What else could you have done?

- *What have you learned?*
- *What would you do differently next time?*
- *What skills or knowledge do you need to develop?*

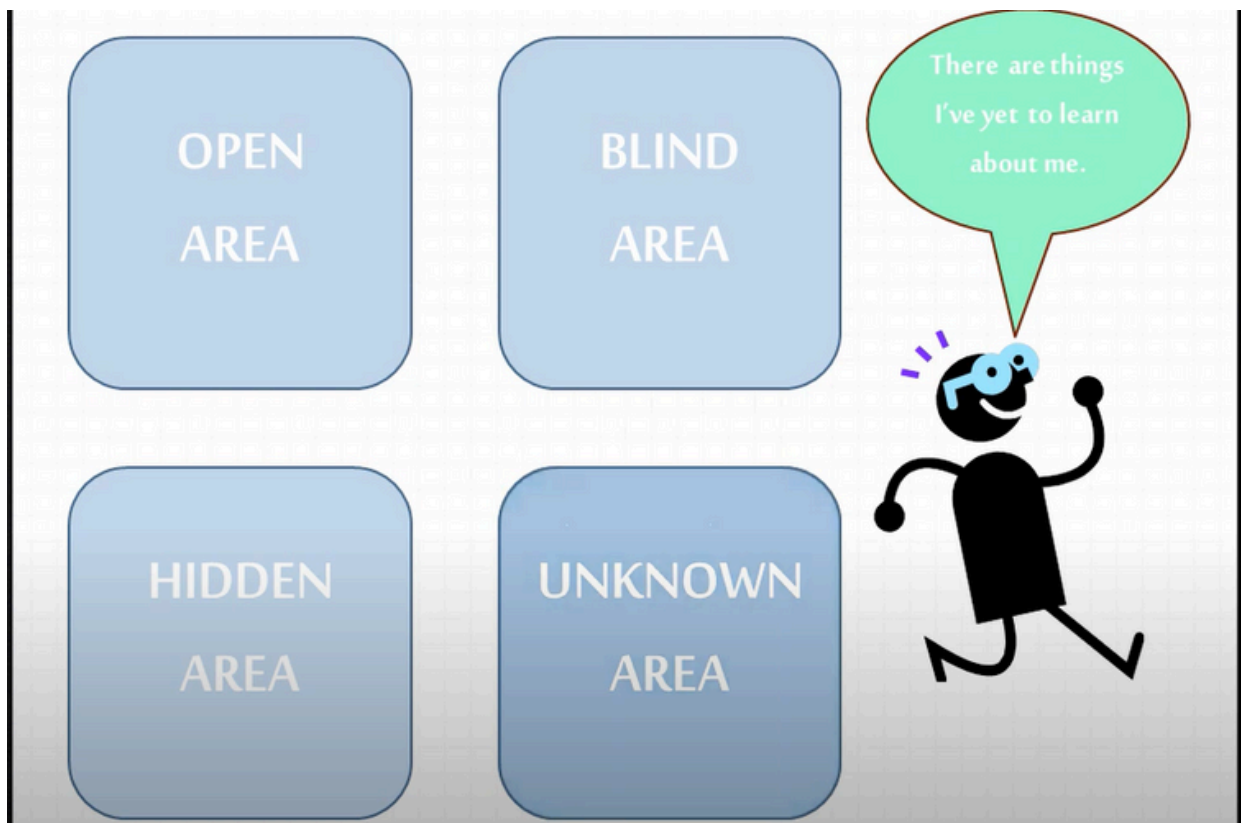
Action Plan- If it happened again, what would you do?

- *How will you apply what you have learned?*
- *What steps will you take to improve?*
- *Who or what could support you in future situations?*

There are a number of resources available in relation to leadership and self awareness. These are listed below.

The Johari Window: A tool for self insight

Click link in image to view video.



The Johari Window is a psychological model developed by Joseph Luft and Harrington Ingham to enhance self-awareness and interpersonal understanding.

Advantages for Team Working

- Builds trust through openness and shared understanding.
- Improves communication by clarifying assumptions and perceptions.
- Encourages empathy and appreciation of diverse perspectives.
- Supports development by identifying strengths and areas for growth

If you would like to use this in a team setting, encourage each team member to share one insight from their Johari Window.

Use this to:

- Foster mutual understanding
- Identify complementary strengths
- Create a shared language for growth and feedback

Appendix A for greater detail



Reflection Activity

Complete a Johari window exercise for self knowledge and introspection- Appendix A



Daniel Goleman's Emotional Intelligence

Click link in image to view video.



Increased knowledge and self-awareness has positive impact on leaders as it enables emotional regulation, clarity of purpose and improved decision making.

Daniel Goleman's concept of Emotional Intelligence (EI) highlights the importance of understanding and managing emotions—both your own and others'—as a key factor in personal and professional success. Goleman's concept contains four domain with key competencies that help us connect with others, lead more effectively, and navigate life with empathy and purpose.

1. Self-Awareness – *Understanding your own emotions, strengths, limitations, and how they affect others.*

2. Self-Management – *Regulating emotions, staying calm under pressure, and acting with integrity.*

3. Social Awareness – *Empathising with others and recognising emotional cues in social or organizational settings.*

4. Relationship Management – *Guiding, inspiring, resolving conflict, and fostering positive connections with others.*

Unlike IQ, Emotional Intelligence is not fixed and can be developed through intentional effort and practise.



Reflection Activity

Undertake Emotion Journaling exercise to identify emotional patterns and triggers.

This will help to provide greater awareness and understanding of your reactions.

- *At the end of each day, write down an emotional experience which took place that day.*
- *Note the situation, your feelings, and how you reacted.*
- *Reflect on how these emotions influenced your decisions and interactions.*

Feedback: Strengthening Leadership through Insight

360° feedback is a development tool that gathers input from a range of sources—peers, direct reports, managers, and sometimes external stakeholders—to provide a well-rounded view of an individual's strengths and areas for growth. Unlike traditional top-down reviews, it offers multiple perspectives that reveal blind spots and reinforce self-awareness.

Why it is useful:

- Promotes self-awareness by showing how others perceive your behaviour and impact.
- Encourages continuous improvement through constructive, balanced feedback.
- Builds trust and accountability within teams by fostering open dialogue.
- Enhances team dynamics by helping individuals understand how they contribute to collective success.
- Used thoughtfully, 360° feedback can be a powerful catalyst for personal growth and stronger, more collaborative teams.

We have a variety of 360-feedback tools available, all of which focus on leadership behaviours and competencies.

- Directors, Chief Executives, and those aspiring to these roles can access the appropriate 360-feedback tool here [Home - Senior Leadership Gateway](#)
- A new 360-feedback tool for those in operational leadership roles, linked to the Operational Leadership Success Profile [OLSP](#) is being developed - it will be available here [Home | Leading to Change](#)
- If you would like your feedback to focus on the Six Leadership Capabilities for Health and Social Care [Leadership capabilities | Turas | Learn](#) you can access the 360-feedback tool here [Turas Feedback | Leadership Capabilities New](#)

To get the best from the 360-feedback process it is strongly recommended that you discuss your choice of feedback tool with a trained feedback facilitator before registering. Please contact gram.wcd@nhs.scot to arrange this.



Additional Resources

See below for additional resources you may wish to access to support development.

- [Developing Self Awareness Webinar](#)
- [Turas Leadership Capabilities modules](#)
- [Leading to Change Self Assessment Questionnaire](#)





“Self- leadership is about awareness, tolerance, and not letting your own natural tendencies limit your potential”

— Scott Belsky

Leading Self

When a leader is experiencing significant pressure to deliver outcomes, considerably reduce the budget, or design and deliver services to a new client group at short notice, this leader may experience temporary stress and anxiety as a result.

A leader who is able to manage these difficult feelings, and limit the impact of his or her emotional state on the team is likely to lead a team to achieve a stronger and more well developed response to whatever ‘pressure’ is being brought to bear on the service.

We have learned from the field of neuroscience that when we experience feelings like fear, our neo-cortex (the problem solving, ‘rational and analytical’ part of our brain) is less able to function optimally. These difficult feelings, originating in our limbic brain (the oldest part of our brain, in evolutionary terms) have a direct and limiting impact on our brain’s functioning. This specifically affects our ability to recall information, to problem solve, to think creatively, and to relate with one another. Therefore being able to manage difficult feelings as a leader, thus limiting the impact of them on our teams, is a valuable ‘tool’. Working to establish a ‘positive feeling’ environment for teams – as far as is reasonably possible, and understanding that there will always be experiences in teams that produce difficult feelings, supports their effectiveness; even when times are challenging.

“The leader of a group of people has the ability to sway everyone’s emotions and therefore affect performance. Emotions tend to be very infectious to all those around.

When leaders drive emotions positively, they bring out everyone’s best. This effect is called resonance. Creating resonance through positive emotions, e.g., enthusiasm, passion, excitement, fun, provides the foundation for people to become ‘star performers’ and flourish within the group, organisation or community.

When leaders drive emotions negatively, they undermine the emotional foundations that let people shine. This effect is called dissonance. Negative emotions such as anger, anxiety, frustration, disappointment, sadness, hurt, actually hijack people’s attention from the task at hand and has a negative impact on performance.”

Global Leadership Foundation, www.f-l-f.org



So, what helps leaders to manage their own feelings?

- *Effective and regular support and supervision, coaching or mentoring. This is particularly helpful if it is outside of the line management relationship. This might be an external professional, a mentor, or the manager of another team.*
- *Informal, yet structured, conversations with a peer, for the purpose of supporting you to process your feelings, reflect on the situation and consider how you will move forward. This might be a reciprocal and regular meeting space.*
- *Mindfulness meditation. There is significant evidence of the impact of mindfulness meditation on our ability to manage stress, anxiety and our feelings more generally. There are numerous resources available on the internet, including popular mobile phone apps like Headspace and Calm.*

• *Time out – away from the office. For a walk, to meet a friend for coffee or lunch, to phone a friend or loved one to ‘offload’. We are all legally entitled to breaks from work, though we increasingly do not take them. During times of stress, they become increasingly important for all of us; but perhaps critically important for leaders.*

• *Spend 10 minutes watching a funny video, using social media (if it connects you to people you care about, specifically), put your ear phones in and listen to your favourite music, or go in a room alone and stand in a ‘power pose’. ([Your body language may shape who you are](#))*

Click link in image to view video.



All of these behaviours have been shown to increase dopamine, our brain’s ‘happy chemical’ and decrease cortisol, our ‘stress chemical’. As outlined earlier, this enables us to think and thus take action; more effectively in a range of ways.

More information on personal resilience and wellbeing is available on the [We Care website](#).

Leading Others

It is important to note one of the most important truths of leadership:

“

people will do as you do, not as you say

”

It is important for people in leadership roles to remember whether they wish to, or not, they are leading by example.

The behaviours they use, and the ways that they relate with others (team members, people who use the service, other professionals), are strong influences on the team's 'norms'.

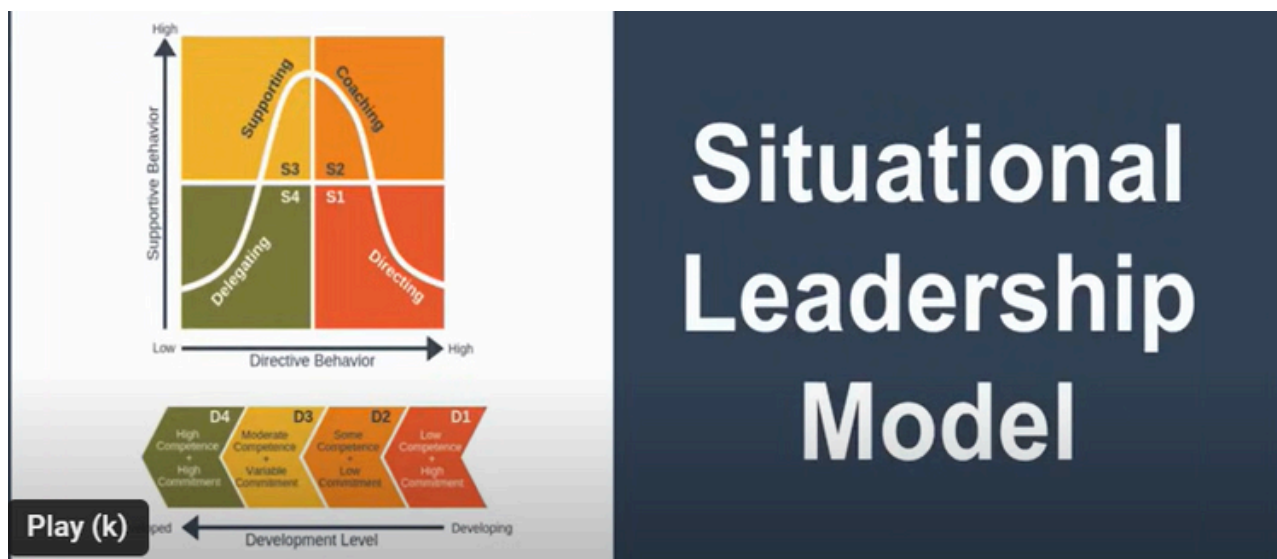


Reflection Activity

- Consider a situation where you believe your behaviour has directly influenced your team. What happened and how would you describe the example you set for your team?
- Reflecting on this, how does this make you feel?
- What went well and what could be improved?
- Do you need to do anything differently in the future?
- What behaviours do you wish to use more regularly, to provide a fresh influence on the team? What difference do you believe it will make?

Situational Leadership

Click link in image to view video



Two theories that can help leaders to match their style to the situation, or offer 'situation leadership' come from Daniel Goleman, Ken Blanchard and Paul Hersey.

Ken Blanchard and Paul Hersey's theory of '**situational leadership**' focuses on adapting one's managerial style to an individual member of the team, to optimise their performance and motivation to achieve. They suggest that the manager orientate their supportive and directive behaviours in relation to an individual's levels of 'competence' (requiring varying degrees of directive behaviour) and 'commitment' (requiring varying degrees of supportive behaviour).

Directive behaviour is defined as the degree of one-way communication from the manager to the employee. In this case, the manager instructs the employee on his role, how to do his work, when and where to do it, etc. Three words that Blanchard uses to sum up this behaviour are structure, control, supervise.

Supportive Behaviour is the degree of two-way communication between the manager and the employee. In this instance, the manager actively listens, provides encouragement and includes the employee in decision-making. Three words that can be used here are praise, listen, facilitate.

For example, when both competence and commitment are high, a manager can use both low directive and low supportive behaviours with an individual – and can confidently delegate. When a team member has a high level of commitment, but low competence – such as a newly appointed member of the team, who is excited to have joined but is new to the role – the manager needs to offer a higher degree of directive behaviour, and less that is supportive.



Reflection Activity

- *Thinking about your leadership journey, can you recall a moment when a team member may have needed more support from you to thrive? What was happening at the time, and how might a more supportive approach have helped unlock their potential?*
- *Thinking about this, what were your motivations at the time?*
- *Thinking about the situational leadership model, is there anything you could have done differently?*
- *Moving forward, how will you monitor your actions taking into account the knowledge you now have?*

Goleman's Six Leadership Styles

Click link in image to view video



Daniel Goleman identified six distinct leadership styles, each one able to be linked to different components of emotional intelligence. Goleman suggests that each style is derived from different emotional intelligence competencies, works best in particular situations, and affects the organisational climate in different ways.



Note

Goleman's six styles are intended as approaches for use with groups, or team; Blanchard/ Hersey's model is intended for use with individuals

Goleman suggests that each style is derived from different emotional intelligence competencies, works best in particular situations and affects the organisational climate in different ways.

1. The directive (formerly known as the coercive) style. This "Do what I say" approach can be very effective in a turnaround situation, a natural disaster, or when working with problem employees. But in most situations, coercive leadership inhibits the organisation's flexibility and dampens employees' motivation.

2. The authoritative style. An authoritative leader takes a "Come with me" approach: states the overall goal but gives people the freedom to choose their own means of achieving it. This style works especially well when a business is adrift. It is less effective when the leader is working with a team of experts more experienced.

3. The affiliative style. The hallmark of the affiliative leader is a “People come first” attitude. This style is particularly useful for building team harmony or increasing morale. But its exclusive focus on praise can allow poor performance to go uncorrected. Also, affiliative leaders rarely offer advice, which often leaves employees in a quandary.

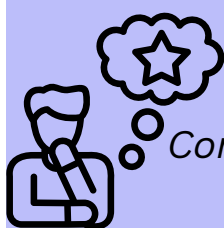
4. The democratic style. This style’s impact on organisational climate is not as high as you might imagine. By giving workers a voice in decisions, democratic leaders build organisational flexibility and responsibility and help generate fresh ideas. But sometimes the price is endless meetings and confused employees who feel leaderless.

5. The pacesetter style. A leader who sets high performance standards and exemplifies them has a very positive impact on employees who are self-motivated and highly competent. But other employees tend to feel overwhelmed by such a leader’s demands for excellence—and to resent their tendency to take over a situation.

6. The coaching style. This style focuses more on personal development than on immediate work-related tasks. It works well when employees are already aware of their weaknesses and want to improve, but not when they are resistant to changing their ways. The more styles a leader has mastered, the better.

The art of leadership, suggests Goleman, is to master all of the styles and use each style appropriately as the circumstances demand just as a multilingual person would speak in the language appropriate to the country or audience. Most people will tend towards one particular style as their natural or default style but be comfortable and competent in two or three different roles. The most effective leader, however, will be ‘fluent in all languages’, a master of all six, using them skilfully as appropriate, being one minute a task-master and later a listening-ear as events require.

All of these styles are useful at different times but used at the wrong time they can be disastrous, for example, too much listening when immediate action is required or only providing a vision when a team needs building or rebuilding.



Reflection Activity

Complete Leadership Style Questionnaire in Appendix B

What both Goleman and Blanchard remind us is that none of these styles or behaviours is always the right one – with groups or individuals.

Organisations, and the people within them, are constantly changing and evolving. A team member who demonstrates both high competence and commitment may, due to personal reasons or changes in the work environment, enter into a period where their commitment weakens – and a manager will need to engage more supportive behaviours with this individual until such time as their commitment is high again.

“Leadership requires disturbing people—but at a rate they can absorb”
— Martin Linsky

Action Centred Leadership

Click link in image to view video



The final theory being shared is a very practical one – useful for keeping a leader’s attention focused on three key areas: the team, the individuals within it, and the task they exist to achieve.

The reality that you are part of the team, and responsible for the team in particular ways, is the reality of leadership. While the notion of being a 'leader' has become quite fashionable in recent years, there is no getting away from the fact that you are also a manager.

For many leaders, the need to fulfil managerial responsibilities often takes up the greatest proportion of their time and energy.



Note

While there are elements of leadership that are also management, and vice versa, at its most simplistic, leadership is about the what and WHY of your team or organisation's activities, and management is about the what and HOW of those activities. The leadership message is the why, the management message is the how.

One theory that combines leadership and management to good effect is John Adair's theory of Action Centred Leadership. This theory is as relevant and useful today as it was when he wrote it nearly 50 years ago.

While Adair's theory reads like a checklist, it includes all of the main orientation points for those with responsibility for harnessing the talents of a group of people to achieve a shared task. He suggests that there are three key domains for a leader to attend to – achieving the task, energising and focusing the team, and developing the individuals.



Adair outlines the orientation points for leaders (whom he then refers to as 'managers') in each of the domains as follows.

Your responsibilities as a manager for achieving the Task are:

- identify aims and vision for the group, purpose, and direction - define the activity (the task)
- identify resources, people, processes, systems and tools (inc. financials, communications, IT)
- create the plan to achieve the task - deliverables, measures, timescales, strategy and tactics
- establish responsibilities, objectives, accountabilities and measures, by agreement and delegation
- set standards, quality, time and reporting parameters
- control and maintain activities against parameters
- monitor and maintain overall performance against plan
- report on progress towards the group's aim
- review, re-assess, adjust plan, methods and targets as necessary

Your responsibilities as a manager for the Group are:

- establish, agree and communicate standards of performance and behaviour
- establish style, culture, approach of the group - soft skill elements
- monitor and maintain discipline, ethics, integrity and focus on objectives
- anticipate and resolve group conflict, struggles or disagreements
- assess and change as necessary the balance and composition of the group
- develop team-working, cooperation, morale and team-spirit
- develop the collective maturity and capability of the group - progressively increase group freedom and authority
- encourage the team towards objectives and aims - motivate the group and provide a collective sense of purpose
- identify, develop and agree team and project-leadership roles within group
- enable, facilitate and ensure effective internal and external group communications
- identify and meet group training needs
- give feedback to the group on overall progress; consult with, and seek feedback and input from the group



Your responsibilities as a manager for each Individual are:

- understand the team members as individuals - personality, skills, strengths, needs, aims and fears
- assist and support individuals - plans, problems, challenges, highs and lows
- identify and agree appropriate individual responsibilities and objectives
- give recognition and praise to individuals - acknowledge effort and good work
- where appropriate reward individuals with extra responsibility, advancement and status
- identify, develop and utilise each individual's capabilities and strengths
- train and develop individual team members
- develop individual freedom and authority

Attending to each domain and maintaining a relative balance is one of the biggest challenges. If any one domain is ignored, the others are unlikely to achieve their full potential.

The elements can conflict with each other. For example, pressure on time and resources often increases pressure on a team to concentrate its time and energy on the task, potentially to the detriment of individuals, and team morale.

An approach that a skilled leader might take, in any challenge, is to balance the needs of all three domains as follows:

- Identify and evaluate the requirements of the task.
- Communicate these to the team, and gain their commitment.
- Plan, with the group, for achieving the task.
- Identify resources within the team, and allocate responsibility to individuals.
- Monitor and evaluate progress of the team, and of individual members.
- Communicate feedback to the team and support, praise, encourage individuals.
- Work with the team to review plans, and make adjustments, until the task is achieved.

In brief, Adair suggests that leaders maintain awareness, and take necessary action when necessary, around six core leadership functions:

Planning - seeking information, defining tasks, setting aims

Initiating - briefing, task allocation, setting standards

Controlling - maintaining standards, ensuring progress, ongoing decision-making

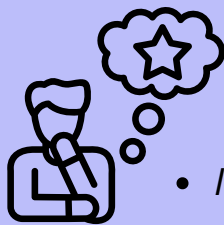
Supporting - individuals' contributions, encouraging, team spirit, reconciling, morale

Informing - clarifying tasks and plans, updating, receiving feedback and interpreting

Evaluating - feasibility of ideas, performance, enabling self –assessment

Each individual, each team, offers unique strengths and challenges.

Even when a team is made up of people with the same professional training and identity, there will be considerable diversity. When teams are being integrated to include not only different professional backgrounds, but also completely different corporate identities, that diversity becomes more complex.



Reflection Activity

- *It can be useful to stop regularly to ask oneself 'am I doing the leadership bit... amongst all of this managing?' Thinking about the past week, what examples do you have of times that you offered leadership? What opportunities were missed?*
- *Reading back through the sections on person/group/task, identify two points in each domain that you believe you deliver particularly effectively; and one that you would like to work on.*
- *What difference do you think your areas of effectiveness make to the work of the team? How could you check this out?*
- *What difference do you imagine developing these three points will make?*

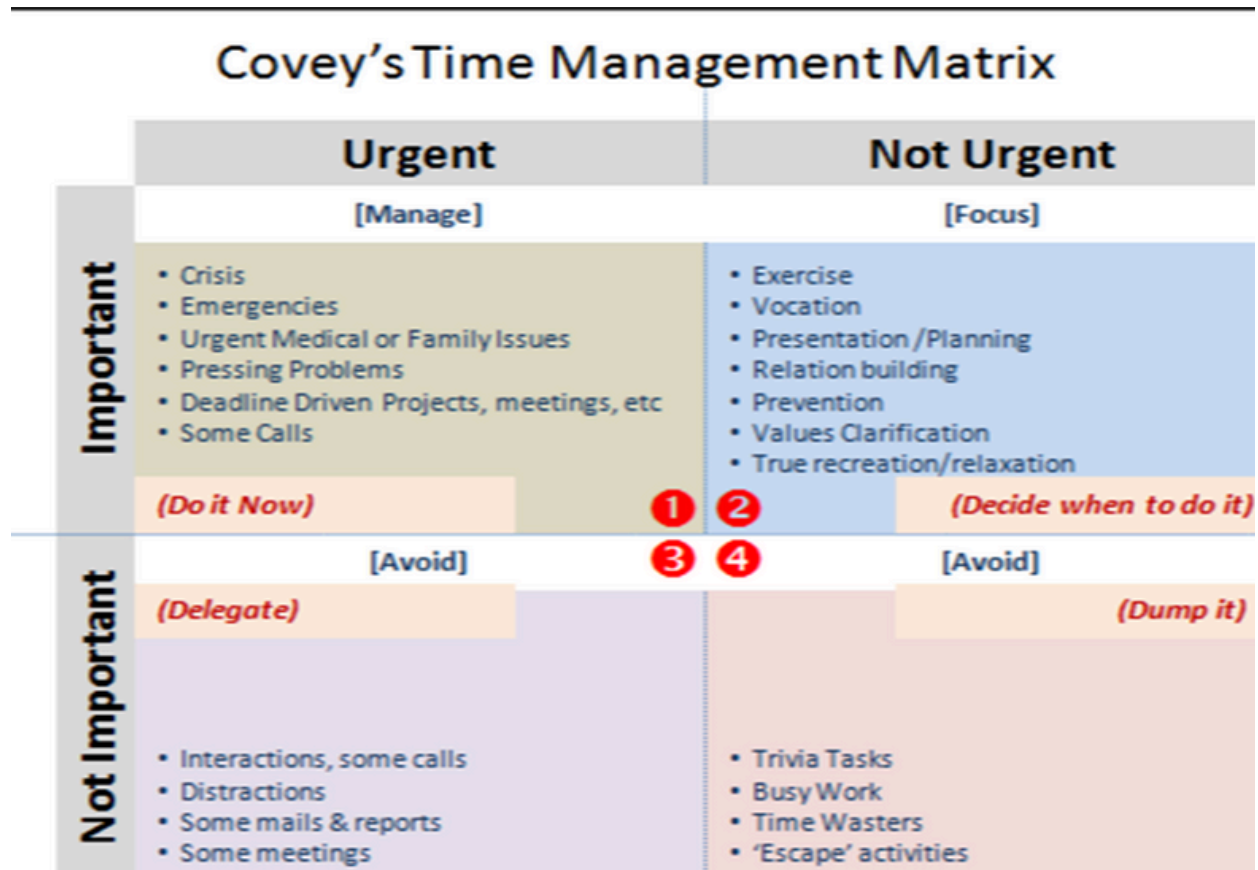
Covey's Time Management Matrix

Click link in image to view video



As a leader, managing your time is one of the most important aspects of your work to get right.

The Covey Time Management Matrix may help you to do this more effectively. It is a framework for prioritising your time and tasks for optimised efficiency and productivity



This model uses a four-quadrant system to help you categorise each task, responsibility and facet of your life based on:

- **Urgency:** Tasks and responsibilities requiring immediate action or attention
- **Importance:** Those with high significance or value to goals

The objective of using this method is to focus on improving both personal and professional relationships as well as promoting growth and accomplishment. This matrix can also be used for teams.

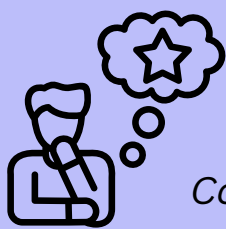
The benefits of following Covey's Time Management Matrix

1. Productivity Boost: Following the time management matrix changes how you deal with the tasks, helping you prioritise them better. If you shrink the amount of time you spend on tasks, then you can significantly increase your productivity.

2. Work-Life Balance: By planning well, you can get rid of your hectic routine effectively. This way, you can spend more time with your friends and family.

3. Chasing Goals: By diverting your attention to important tasks, you can speed up the process of chasing the goals.

4 Avoids Embarrassment: By recognizing the urgent tasks, you can differentiate them from less urgent ones to better meet the deadlines. This way, you can avoid embarrassment and save your reputation.



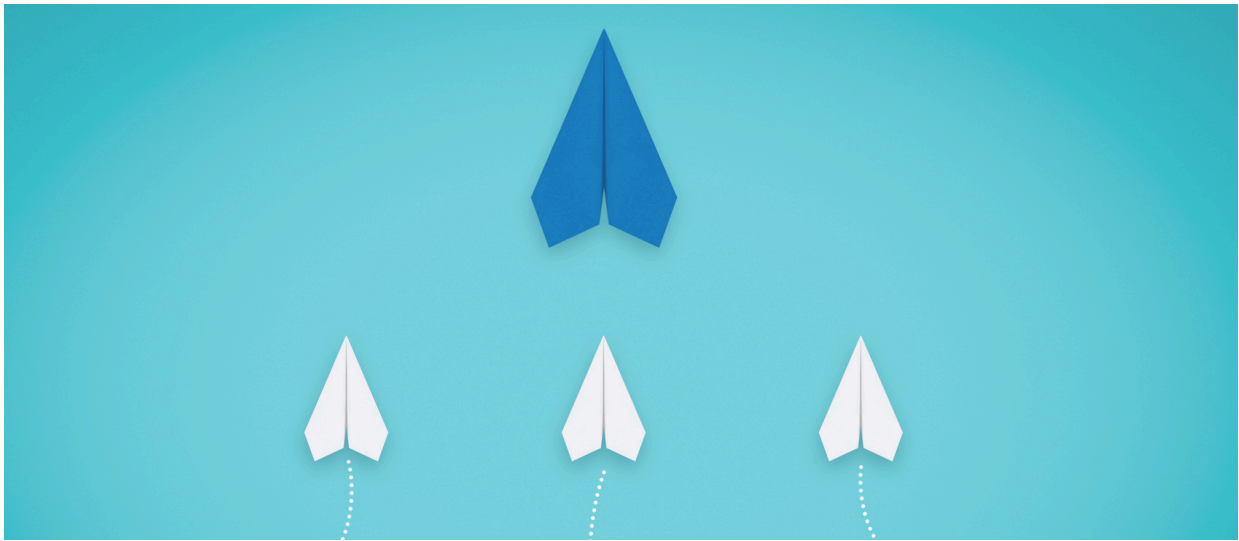
Reflection Activity

Complete the Time Management Matrix in Appendix C

Wellbeing, Culture and Development run a course called Time Management which may be useful and can be booked via [Turas](#).



Leading to Change



“Making change is hard. Leading change is even harder”
— Brian Strobels

This section can be utilised if you are making a change in your team. It could also be used to use as a reflective tool if you are not currently undergoing any change.

Change is simply part of the human experience. It is ever-present and inescapable. We cannot turn our back on change – it will happen regardless. But we can turn our back on growth and learning. Moving beyond the difficulty of change and realising the opportunities it can offer is fundamentally a personal choice.

- *So, when you hear about change, what is the first word that comes to mind?*
- *Is your reaction positive or negative?*
- *Do you initially embrace or resist change?*

It is important for you to examine your feelings, motives, and assumptions about change. Only then can you focus deeply on your own perceptions of change, the way you interact with others, influence and lead change.

The challenge is to allow ourselves to be vulnerable, to be honest with ourselves and others when we hit a wall, when we are not coping, or when we simply need help.



Reflection Activity

Remember and be honest with yourself. You may even notice things you can share with others as you lead them through change.

- *How well do I adapt to change?*
- *Have I reacted negatively to change in the past? If so, what were the reasons?*
- *What feedback have I had in the past about my reactions to change? What impact did this have on others?*
- *What things could I do to help me adapt quicker to change?*
- *Who could help me/ provide me with some individual support at times of change?*





Reflection Activity

Think about a change that is in the pipeline. It may be a short, medium, or long-term change.

Reflect on the questions in the table below and have an inner conversation with yourself.

It is helpful to consider how you could address some of the issues before discussing them with anyone else.

Have I...	Yes/No	What I am going to do now?
Understood why this change is happening?		
Understood the issues involved in planning the change?		
Acknowledged my feelings / emotions about this change? (what are they?)		
Thought about what I may have to let go of (the things that have to end) or adjust to?		
Identified thoughts that may prevent me from adapting to the change?		

Identified memories which might be triggered because of this change?		
Got someone who could help me deal with my emotions in a helpful way?		
Identified the opportunities this transition may create for me?		
Identified actions I could take that might help me adapt to the change?		
Identified any support required from others? (e.g. HR, WCD, Occupational Health, or colleagues who have gone through a similar experience etc.)		

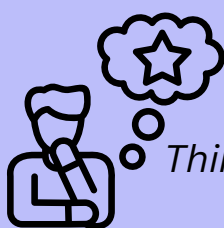
If you have answered no to a number of the questions, it may be worthwhile considering some of the activities in this toolkit and whether you would benefit from further support.

For any advice or support, please contact the Wellbeing, Culture and Development Team on gram.wcd@nhs.scot.

Introduction to Change

Change is not a singular event but rather a series of steps which start from inspiring those around to accept the need for change to embedding the change permanently.

Kotter demonstrated this through the Eight Steps for Accelerating Change.



Reflection Activity

Think of a change you have implemented before.

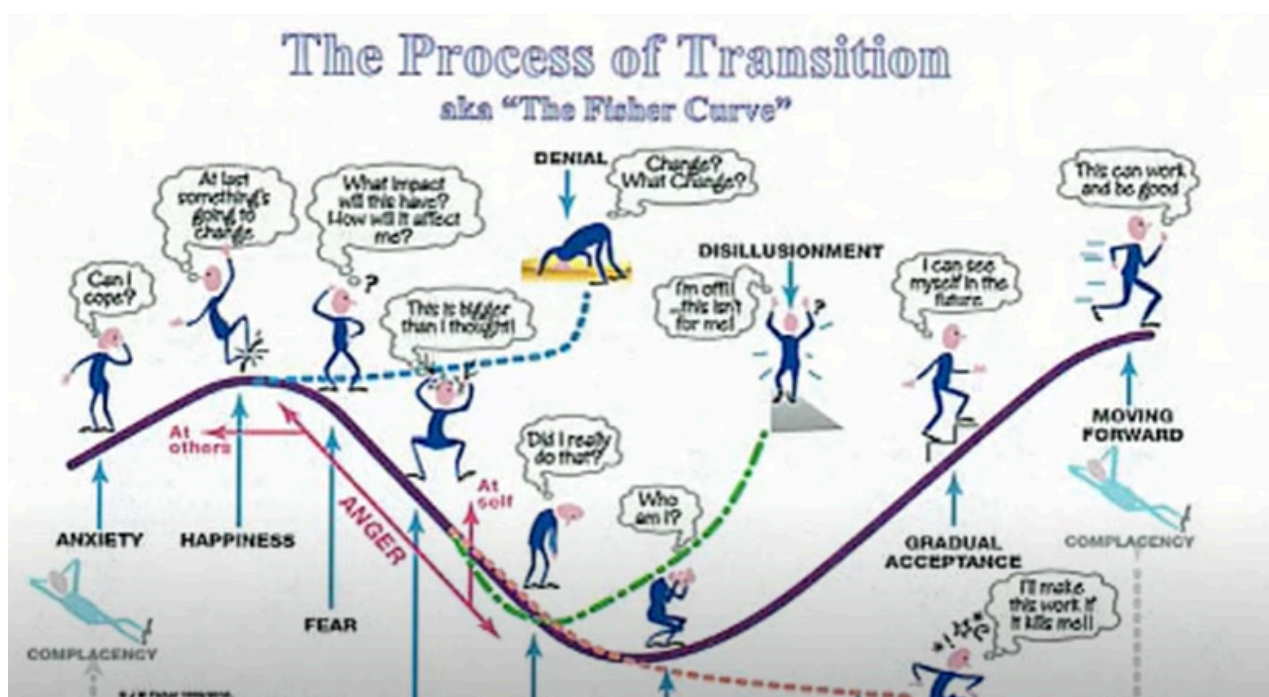
- *Which of the 8 steps did you follow and which ones did you miss?*
- *What worked?*
- *What did not work?*
- *What would you do differently next time?*

Change is emotional

Here's a reassuring truth: people tend to experience a similar and predictable emotional journey when navigating change. Recognising and understanding your own feelings is key to managing this process. By doing so, you can better support yourself through the transition and ultimately reach a place of acceptance and engagement.

The Process of Transition

Click the link in the image to view the video.

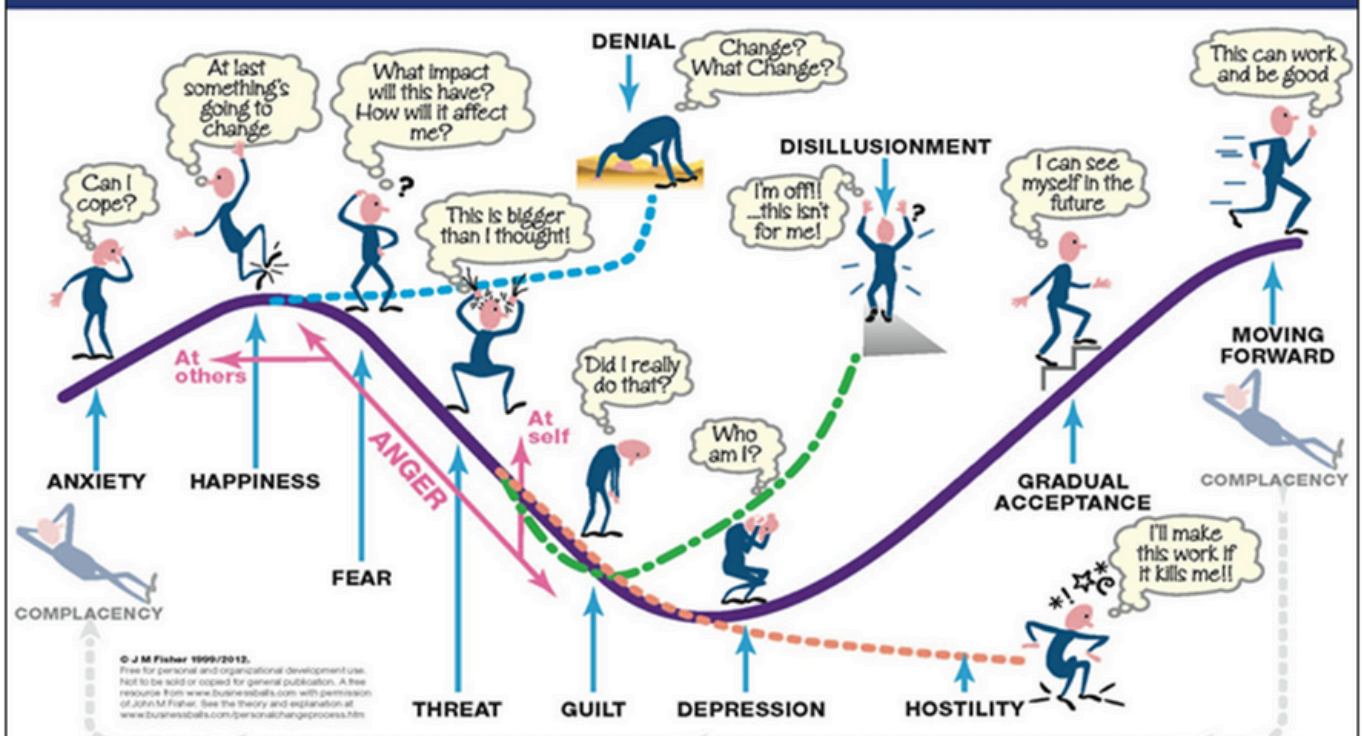


Fisher's Process of Transition shows the journey people usually go through when dealing with change.

The emotion people tend to feel are represented in a curve as follows:



The Process of Transition - John Fisher, 2012 (Fisher's Personal Transition Curve)



How quickly people move across the curve or how deeply they go into the trough of depression (and how long they stay there), depends on certain factors, such as ownership and control.

Importantly, it depends on how ready they were for the change. People are unlikely to be aware of moving systematically from one emotion to the next, but the range of emotions is very common.

Different measures and strategies can be developed to manage the situation according to the stage each individual has reached. As you are leading the change, you may get to the 'moving forward' stage before the rest of the team, so regular communication and feedback is vital.

Your role is to help people make the transition as effectively (and painlessly) as possible. Supporting them to reflect on their past experiences of change and what could be different next time is helpful. Providing information and having regular meetings to communicate the change plan and seek feedback will help people transition through the curve and emerge on the other side. It is important that people feel supported and that they recognise you are considering their emotional journey associated with the change. It is also important that you appreciate that some people in the team will take longer to work through the curve than others.

You may also wish to involve other departments in supporting staff to work towards the change, depending on the issue/barrier affecting individuals within the team. For example, Human Resources, Wellbeing, Culture and Development Team, Spiritual Care and Occupational Health.



Reflection Activity

1. *Where am I currently on the curve in relation to this change process?*
2. *What am I telling myself about the change?*
3. *What do I want from this change? (Specifically what can I gain?)*
4. *Am I aware of the beliefs and attitudes that may get in my way?*
5. *What do I fear losing? What do I need to let go of?*
6. *What is the first step to take to get what I want?*
7. *What will I need from others to help support me?*

This activity may be worthwhile sharing with your team to establish how they feel about the change and what you can do to support a smooth transition.

Begin with the End in Mind

As you lead change, your task is to start with the end in mind- the Vision associated with the change. Plans may change but if you keep your vision in mind, you will be able to motivate others and move your change forward.

What is the reason for the change?

When people learn of a change, their first question is often "Why is this happening?"

To gain support, you must provide a compelling case.

- How will people be better off?
- How will they be involved/engaged in the change?
- Why should they engage?

Having a clear vision, in terms of what the change will achieve, is crucial to the success of your proposed change initiative, and you need to be prepared to communicate this at all times.

The Vision! Where are we going, and why?

Almost everyone knows the importance of having a vision... the problem is it is not often communicated well.

A true vision paints a clear picture of what the change will look like if successfully implemented. To inspire people to act, that vision has to describe a change that would benefit those involved in it.

Too many people that lead change often think that the change plan is more important than the vision – this is not the case. A plan is uncertain, changeable, and can be flawed. The vision on the other hand is fixed and should be inspiring.



Once you have a Vision, you should consider how you can succinctly communicate this to others. It is suggested you should be able to do this within 30 seconds to maintain interest.

This is referred to as the '[Elevator Pitch](#)'.

There are many examples of how to do this but essentially you should focus on what the issue is, why it is important to change, and provide insight into your vision.

Resistance to Change

When we are seeking to implement significant change in teams or organisations, it is almost certain that we will encounter some resistance – even when we have been clear about why change needs to happen.

Resistance comes in many forms – overt (disagree loudly and repeatedly), covert (agree in public, undermine in actions), passive aggressive (not make agreement/disagreement clear, and then undermine through actions). People may agree and embrace initially, and then resist as the process unfolds. For some people change is primarily exciting – and for some, it is primarily destabilising and resented; and for the majority, somewhere in the middle.

As leaders and managers, we often put a lot of energy into trying to convince, and ‘win over’, the people who resist the most. While it is tempting to do so, in an attempt to get 100% buy-in, there is likely to be more significant, and quicker, gain when emergency is put into mobilising those who buy in early in an effort to develop confidence in the change amongst their colleagues.

There are a number of tools which can be used in change to support:

- [Force Field Analysis](#)
- [Stakeholder Analysis](#)
- [Communication Plan](#)

The ‘Diffusion of Innovation’ theory was developed by EM Rogers in 1962, and was developed to explain how, over time, an idea of product gains momentum and diffuses (or spreads) through a specific population or social system. The end result of this diffusion is that people, as part of a social system (in this instance, a team or organisation), adopt a new idea or behaviour.

Adoption of a new idea, behaviour, or product (i.e., ‘innovation’) does not happen simultaneously in a social system; rather it is a process whereby some people are more apt to adopt the innovation than others. Researchers have found that people who adopt an innovation early have different personality characteristics than people who adopt an innovation later. When promoting innovation within a team or organisation, it is useful to consider the characteristics that will likely help or hinder adoption of the innovation; and how they are represented in the group.

There are five established adopter categories:

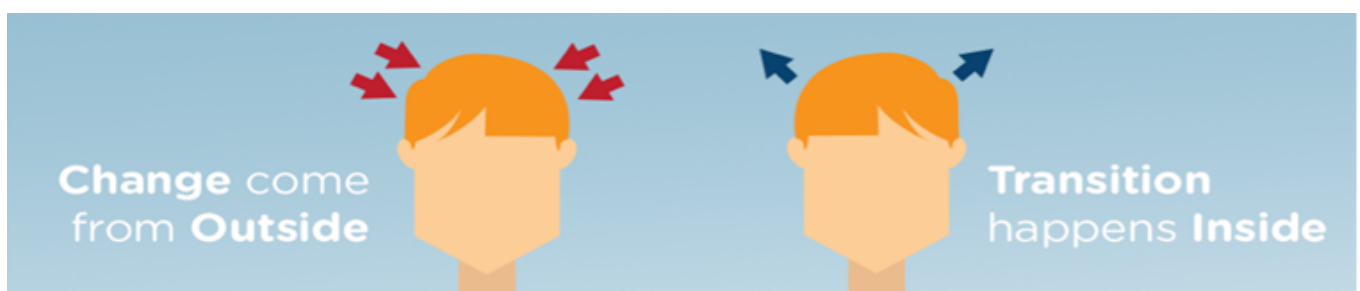
Innovators	These are people who want to be the first to try the innovation. They are adventurous and interested in new ideas. These people are very willing to take risks, and are often the first to develop new ideas. Very little, if anything, needs to be done to appeal to this population.
Early Adopters	These are people who represent opinion leaders. They enjoy leadership roles, and embrace change opportunities. They are already aware of the need to change and so are very comfortable adopting new ideas. Strategies to appeal to this group include how-to manuals and information sheets on implementation. They do not need information to convince them to change.

Early Majority	These people are rarely leaders, but they do adopt new ideas before the average person. That said, they typically need to see evidence that the innovation works before they are willing to adopt it. Strategies to appeal to this group include success stories and evidence of the innovation's effectiveness.
Late Majority	These people are sceptical of change, and will only apply an innovation after it has been tried by the majority. Strategies to appeal to this population include information on how the innovation has been adopted, by whom, and how it has made a positive difference.
Laggards	These people are bound by tradition and tend to be very conservative in their thinking. They are very skeptical of change and are the hardest group to bring on board. Strategies to appeal to this population include statistics, ultimatums, and pressure from people in the other adopter groups.

William Bridges makes a clear distinction between change and transition. Change and transition mean different things to different people. As someone leading change it is important to take time to understand the difference.

Change is the shift in the external situation; the thing that has changed. It can happen quickly.

Transition is psychological and is the re-orientation people need to make in response to the change. This can take time.

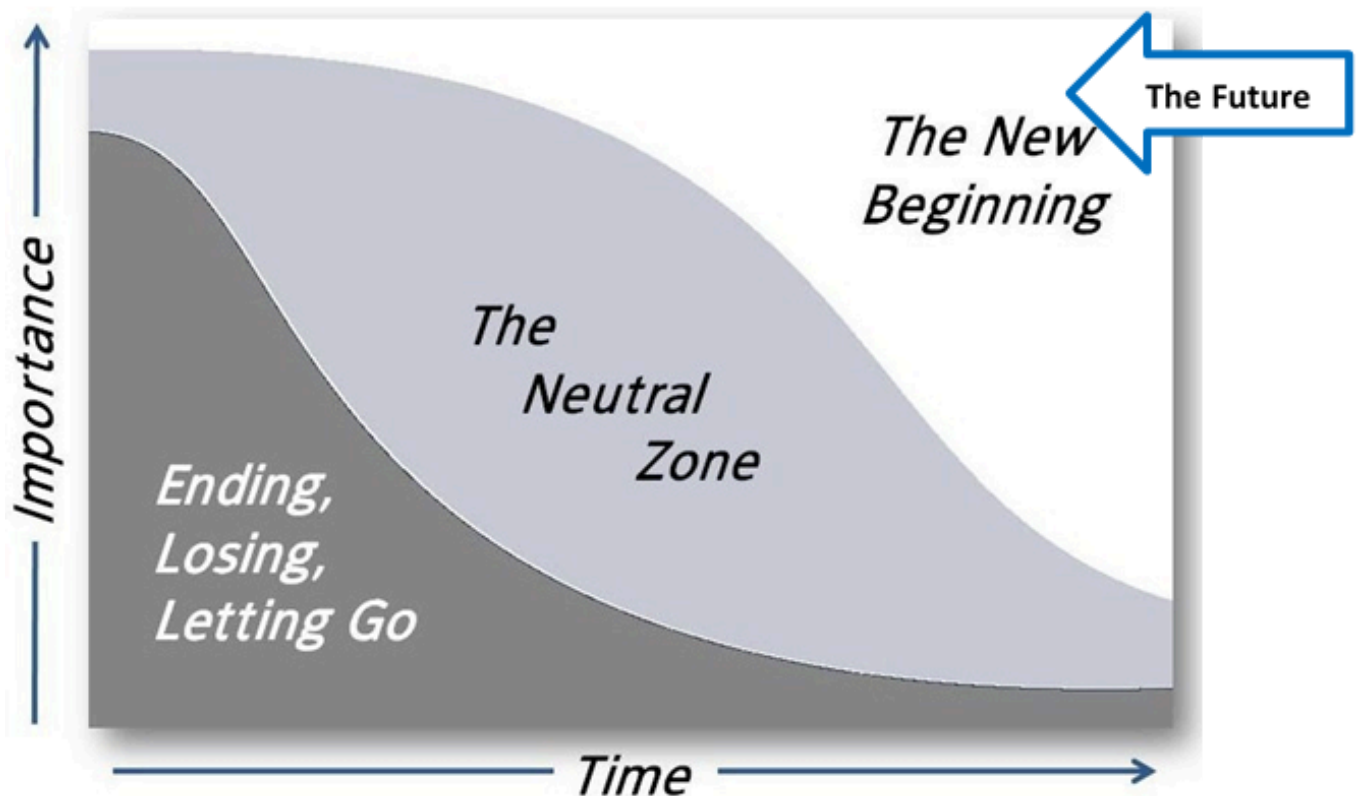


Bridges labels transition as the more complex of the two.

Change	Transition
<ul style="list-style-type: none"> • External process or situation • Organisational • More visible • Tangible • More predictable • Happens to people • Tends to move quickly 	<ul style="list-style-type: none"> • Internal process • Personal • Less visible • Intangible • Less predictable • People choose it • Tends to move more slowly

Bridges identified three (natural, predictable and necessary) phases if people are to transition and for a change to be successful:

- **Endings, Letting Go**
- **The Neutral Zone**
- **The New Beginning**



If you focus on 'Ending, Losing, Letting Go' (The Past) where there is certainty, you may never move forward or grow.

‘The New Beginning’ (The Future) is where there is hope of new and better things and where growth and learning are realised.

Between ‘The Past’ and ‘The Future’ lies the ‘Neutral Zone’ where you neither focus on ‘The Past’ nor ‘The Future’, rather on the uncertainty of the situation



Reflection Activity

Having a proposed change (and understanding the vision), some of the things I may need to ‘let go of’ or ‘end’ before I can move on to ‘new beginnings’ are...

I can ‘see what’s in it for me’ and some of those things are...

What could the ‘neutral zone’ be? How can I avoid getting stuck in the ‘neutral zone’?

What support will I need?

As the person leading on change, complete the table below to reflect on your personal thoughts and the actions you can take.

I will...	What else do I need to make this happen?
Know what hindering thoughts people have about the future.	
Ensure everyone understands the reasons for the change.	
Tell people what they need to know so they can understand why this change is happening.	
Know what people may perceive as being unfair about this change.	

Know what possible questions people are most likely to want answers to.	
Help my team get the support they may need.	
Provide information to help the team better understand this change.	
Ensure clear and effective communication throughout the period of change.	
Help my team make adjustments to 'endings'.	
Know what actions I could take to help the team adapt to the change.	
Spend time with each person to help them identify their 'endings' – what they may need to 'let go of'.	
Provide information to help the team understand the change.	

To keep momentum, it is important to continuously Reflect, Evaluate and Get Ready for the next change.

“We keep a change in place by helping to create a new, supportive, and sufficiently strong organizational culture”
— John P Kotter

Continuous improvement helps us handle the changes that are happening around us. We need to keep a steady dialogue about learning and improvement. **We need to** encourage staff to learn and adapt, so they can keep up with – and stay ahead of – change.

Sustaining success depends on your ability (and your team's ability) to adapt to the changing environment, while remaining innovative – whether it's an external change or an internal change.

If you are interested in undertaking any training or upskilling in Quality Improvement, modules can be accessed [here](#) and [here](#).



What is coaching?

Coaching is a series of one-to-one conversations that provide an opportunity for you to pause, think, reflect and plan.

Coaching is:

- Flexible – no two coaches are the same and there is no set plan for sessions. Each individual will work with their coach to set the pace and goals for their sessions.
- Non-directive – coaches do not tell clients what to do or offer advice. They support people to make their own decisions. It is an equal partnership.
- Non-judgemental – there is no 'right' answer. Coaching can be a challenging experience but it is also rewarding.

- Confidential – your coach will not discuss anything about your coaching with anyone without your consent, including with your manager. The only exception is if the coach is concerned that you may harm yourself, others or the organisation. You are free to share as much or as little about your own coaching with others as you wish.

Coaching is not...

- Counselling or therapy – sometimes coaching is not the right option.
- Teaching, mentoring or advice giving – the coach won't tell you what to do.
- A substitute for performance management – coaching cannot be beneficial if you do not want to participate.
- A magic wand or easy option – it can be hard work.

If you would like access to a coach, the application form can be found via [Turas](#) and email to gram.coaching@nhs.scot



What is mentoring?

Mentoring is a series of one-to-one conversations that provide an opportunity for you to pause, think, reflect and plan in the company of an individual who has personal experience of the work-place situations you wish to discuss.

Mentoring is:

- a means of supporting individual learning and development

- focused on increasing an individual's competence and confidence
- a clearly structured and time-bound process - with clear, mutually agreed roles, responsibilities and goals

Mentoring is not:

- a way of sorting poor performance
- casual meetings which provide the mentee with a chance to unburden themselves and get advice
- an opportunity for the mentor to demonstrate his or her superior knowledge and to prescribe what the mentee should do
- about managing people and their development

If you would like to be mentored, please complete the application form found by accessing Turas [here](#) and email gram.coaching@nhs.scot.

How do you sustain yourself?



Everyone should have the ability to access health and wellbeing resources at the appropriate time, to allow each person to reach their full potential.

There are a variety of offerings within Wellbeing, Culture and Development which have been designed to support and grow you personally and professionally.

To access the various offering Wellbeing, Culture and Development have on offer, please visit our Turas page via this [link](#).



Appendix A

Using the Johari Window: Step-by-Step

The Johari Window works by mapping traits across four quadrants—**Open, Blind, Hidden, and Unknown**—based on what is known or unknown to self and others. Here's how to apply it:

1. Start with a Trait List

- Choose 5–6 adjectives from a curated list (often 52 traits are used). Sample Adjectives (feel free to add your own): Able, Accepting, Adaptable, Bold, Caring, Cheerful, Clever, Confident, Dependable, Empathetic, Friendly, Honest, Independent, Kind, Logical, Mature, Observant, Organised, Patient, Reflective, Reliable, Self-aware, Sensible, Supportive, Thoughtful, Trustworthy, Warm
- Select those that best describe yourself.

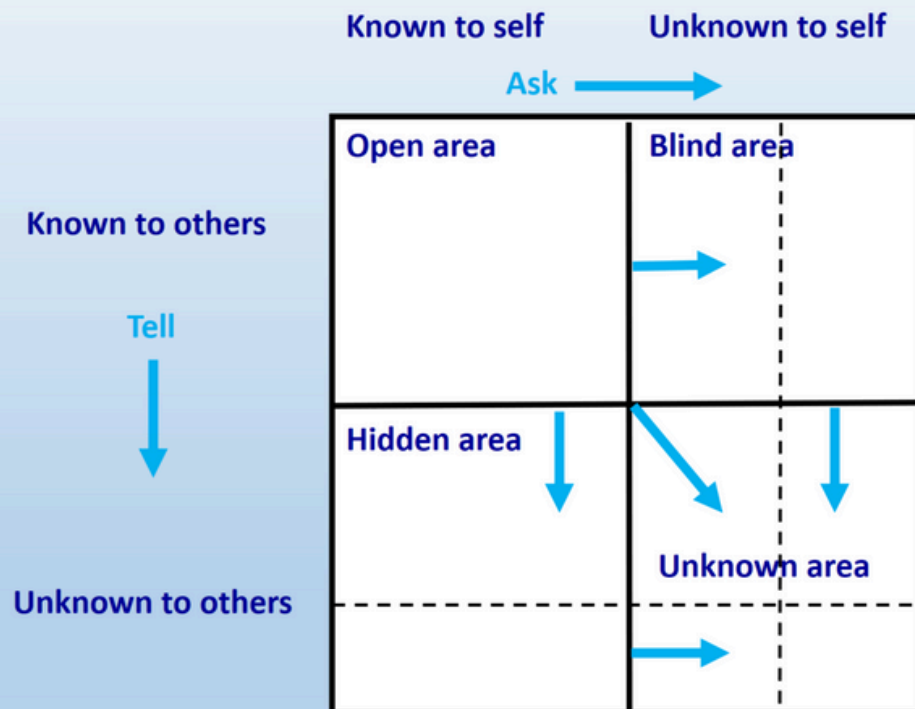
2. Invite Feedback

- Ask colleagues, friends, or team members to choose traits they feel describe you.
- Compare their selections with your own.

3. Plot the Results

- Open Area: Traits both you and others selected.
- Blind Spot: Traits others selected but you did not.
- Hidden Area: Traits you selected but others did not.
- Unknown Area: Traits not selected by anyone—potential yet to be discovered.

Johari Window



4. Reflect and Discuss

- Explore differences and overlaps in perception.
- Use feedback to uncover blind spots and consider sharing more from your hidden area.

Use these questions to guide personal reflection:

- *What surprised you about the feedback?*
- *Which blind spot traits might you want to explore further?*
- *Are there hidden traits you would like to share more openly?*
- *How might these insights improve your communication or leadership style?*

5. Apply Insights

- Use the findings to improve communication, build trust, and align personal and team goals.
- Revisit the exercise periodically to track growth and changes.

Appendix B

Leadership Style Questionnaire

The following statements each describe aspects of leadership behaviour. Respond to each statement according to how you would most often act when in a leadership position.

Score yourself between 6 – very like my style, to 1 – very unlike my style.

It is important to score yourself as you most often are rather than how you would like to be or try to be.

	Statement	Score
1	I am good at getting along with people	
2	I often talk to others about what we can achieve if we all pull together	
3	I enjoy identifying the latent talent in others	
4	People often need to be cajoled into high performance	
5	I prefer to reach decisions by consensus	
6	I have high expectations of others	
7	I find the best way to get results is to really understand people	
8	I like to lead from the front	
9	I enjoy giving others the benefit of my experience	
10	I like to stress to others the consequences of their actions	
11	I prefer to be seen more as part of a team than a figurehead	

12	I believe that competition is a healthy way to improve our performance	
13	Listening is one of my greatest strengths	
14	I give people greater self-belief	
15	I think it is important to delegate for development purposes as much as to get the job done	
16	I believe I have a duty to get people to understand the reality of a situation even if it is unpleasant	
17	I like to get buy in to ideas before implementing them	
18	I often need to take the lead in order to get things done	
19	Group harmony is one of my main priorities	
20	I am often seen as the group spokesperson	
21	I believe that people's potential is unlimited, they often just need a helping hand	
22	I am generally the one who confronts difficult people	
23	I actively seek input from others	
24	I like to instil a sense of urgency	
25	I am often the peace-maker	
26	I promote a 'can do' culture	
27	I like to play to people's strengths	
28	I sometimes bully people to get things done	

29	I look for opportunities to collaborate with others	
30	I am often the person who makes things happen	

Score your answers

SCORE SHEET

Place the score you allocated to each of the numbered statements in the six boxes below, and then add up your total score in each of the boxes.

Affliative	Authoritative	Coaching	Directive	Democratic	Pace setting
1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30
Total	Total	Total	Total	Total	Total

The total scores in each of the boxes indicate to what degree you prefer each of the leadership style.

Appendix C

Time Management Matrix

Source: Covey (1994) *First Things First*

Divide your activities into four quadrants depending on their importance and urgency. Let's discuss both of these terms before moving on to the strategy itself.

These are the four quadrants of the Time Management Matrix:

Q1: Urgent and important.

Q2: Not Urgent but important.

Q3: Urgent but not important.

Q4: Not urgent and not important.

By prioritising your tasks across four quadrants, you can differentiate between tasks that make a real difference in the end. The following is a brief overview of what each quadrant contains.

	Urgent	Non-urgent
Important	Daily Reality	Quality
Not Important	Deception	Waste

Q1: Urgent and Important:

This quadrant is located at the top left. Problems and crises that require immediate attention belong in quadrant one. Neglecting them, in the long run, can be problematic for you.

Preparing a presentation for an important meeting that will commence after a short time is a type of task that falls in quadrant one. It is urgent because you do not have much time for it and it's important as you have to get it ready before the meeting starts.

Tasks involving deadlines, sending daily emails, and similar activities with direct impact are urgent and important.

Q2: Not Urgent but Important:

This quadrant is on the top right. In this quadrant, you will find tasks that directly relate to your long-term goals. It requires your thorough attention; however, it is not urgent as there is no limited time to complete this task.

If you have a long-term goal of establishing your reputation in an office, it may not be that urgent; however, it is still important.

Developing relationships, long-term planning, personal development, improving health, and related activities fall within this quadrant.

Q3: Urgent but Not Important:

This quadrant is located in the bottom left corner of Covey's time management matrix. All those activities may seem urgent to you, but you can remove them from the workflow since they hold minimal importance for you.

Let's say you are working on an important project and you get a call from a colleague asking you to join a meeting. If the meeting is unplanned without an agenda, you may choose to skip it. Since, overall, it won't have any positive impact on your life.

In other words, all the time-wasting activities fall in this quadrant. No matter if it is unimportant calls or sending emails that do not add any value.

Q4: Not Urgent and Not Important:

In Covey's time management matrix, this quadrant is at the bottom right-hand side. All activities that take up time without producing any value fall into this quadrant. You can save valuable time by avoiding those chores and spending it on more valuable activities.

The tasks you do for entertainment alone, such as watching the television, surfing the web for hours, gossiping about people, are neither urgent nor important for you

