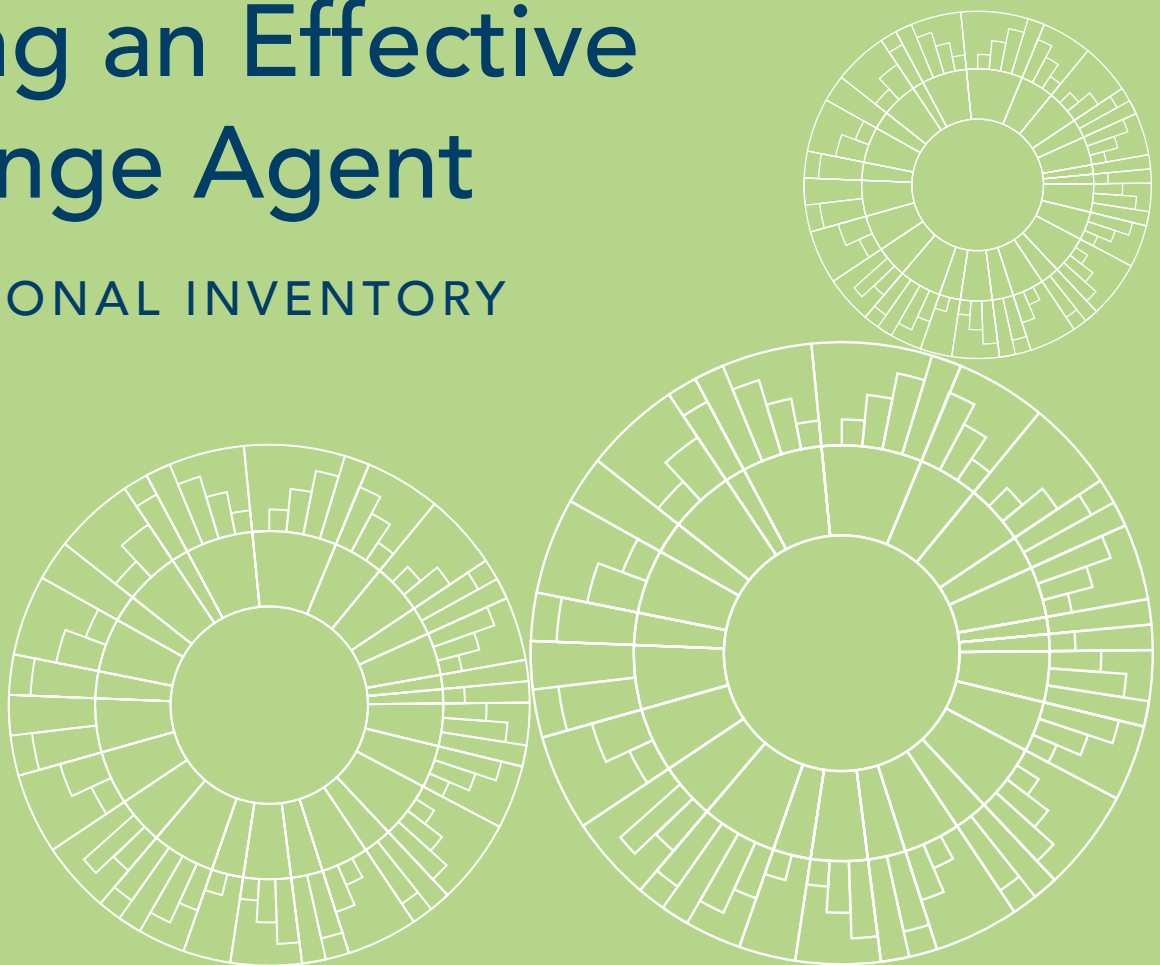


# Being an Effective Change Agent

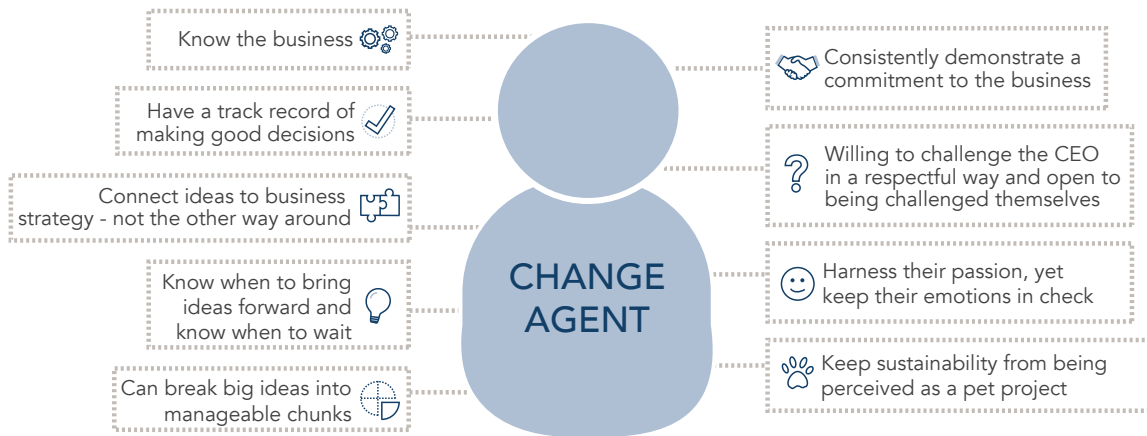
A PERSONAL INVENTORY



# Effective Sustainability Change Agents in the Eyes of a CEO

We asked CEOs to describe the characteristics of effective sustainability change agents. This inventory has been designed to help you reflect on what they said, and think about how you could bolster your own readiness and effectiveness. We encourage you to use this as a tool to help reflect on and plan your personal development. Consider using this tool with your sustainability team, review it with your mentor or gather together some peers from different companies and use it to structure a peer coaching session.

In our guide on the Characteristics of Effective Change Agents, we describe each of these characteristics in more detail. Here, we provide a worksheet to help you reflect on how they apply to you.

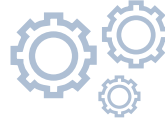


## Approaches to consider

Use pages 4 to 12 to evaluate the degree to which you possess each of these characteristics, as well as plan for how you might improve them. Then use page 13 to build your personal change agent development plan.

- 4 Know the business
- 5 Build a track record of making good decisions
- 6 Connect ideas to business strategy
- 7 Know when to bring ideas forward and when to wait
- 8 Break ideas into manageable chunks
- 9 Consistently demonstrate a commitment to the business
- 10 Be willing to challenge the CEO respectfully and be challenged in return
- 11 Harness my passion, yet keep my emotions in check
- 12 Keep sustainability from being perceived as a pet project
- 13 My change agent development plan

## Know the business



How well do I know our business? Where could I stand to learn more about what we do and how we do it?

I could build up my own knowledge of our business by:

Spending more time in the operations / job shadowing

Participating in industry level initiatives

Supporting a project or serving on a committee in an area/topic I'm less familiar with

Participating in other departments' meetings

Meeting one-on-one with key people to understand their roles, processes, and challenges

Taking courses on topics related to the business

Reading corporate and industry newsletters and annual reports and other publications

Keeping tabs on emerging trends for your sector, not just sustainability trends

This year, I will:

## Build a track record of making good decisions



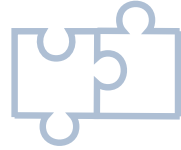
Do I have a track record of making decisions that have been good for this company? Would people see me as having a strong track record?

I could build up my own track record by:

- Breaking what I do into measurable deliverables
- Clearly communicating successful completion of milestones
- Partnering with people in the organization that have a very strong track record
- Developing simple frameworks
- Building my decision making skills through courses or coaching
- Documenting past successful decisions as case studies
- Being able to explain my decisions in business terms

This year, I will:

## Connect ideas to business strategy



Without looking at the company website or pulling up any internal documents, can I describe the core elements of my company's business strategy in a few bullet points? How well do I identify opportunities to connect sustainability to our core strategy? Do others perceive that I may be trying to introduce a new strategy instead of building on our existing business strategy?

I could incorporate sustainability better into the core business strategy of our business by:

- Better understanding the nuances of our core business strategy

- Feeding environmental and social megatrends into the strategy formation process

- Feeding environmental and social performance data into the strategy formation process

- Using existing strategy language when communicating sustainability internally

- Working with people from other departments to find ways that sustainability could help them deliver on the current strategy

- Making explicit reference to how sustainability meets our strategy objectives

- Identifying future risks and opportunities that should inform our strategy going forward

This year, I will:

## Know when to bring ideas forward and when to wait



Do I pay enough attention to the timing of when I bring ideas forward?

I could get the timing right by:

Having a sense of what are the 'big plays' versus more incremental moves

Undertaking preparatory work and/or research that anticipates the questions my CEO might ask

Seeking feedback from trusted insiders on the readiness of my proposal

Keeping on top of the current issues facing the executive/management team

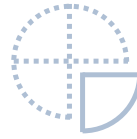
Being ready to leverage issues in the business or issues raised in the media

Being aware of the business planning and budgeting cycle

Identifying key dates and events in the corporate and/or industry calendar

This year, I will:

## Break ideas into manageable chunks



Do I make big projects seem manageable?

I could help others see how sustainability changes could be manageable by:

Developing concise and concrete actions

Considering what the audience has control over/ability to influence

Ensuring that the first chunks are achievable in order to build momentum

Making use of clear, simple, diagrammatic representations of the idea

Using in situ examples from the business to illustrate what the idea means, or could achieve

Discussing projects in terms of phases

Avoiding overly technical language or jargon when describing ideas

This year, I will:



# Consistently demonstrate a commitment to the business



Do I consistently demonstrate that I'm a team player and committed to the success of our business? What have I done to demonstrate this?

I could demonstrate my commitment by:

Speaking positively but authentically about my company to others inside and outside the company

Using "we" language

Framing my ideas and actions in the context of building long term value for the business

Participating in events/initiatives that are seen as core to the culture/business success even if they are not directly relevant to my job

Prioritizing a few initiatives that have clear business benefit

Listening more and talking less

Building connections to all levels of the enterprise

Acknowledging and giving credit to others for sustainability initiatives when it is due

Helping others build their understanding of how sustainability affects the business

Helping others to do well in their positions through sustainability successes

Remaining non-judgmental

This year, I will:

## Be willing to challenge the CEO respectfully and be challenged in return



Have I been willing to respectfully challenge my CEO's thinking on sustainability? Am I willing to be challenged myself?

I can engage in a constructive engagement with my CEO by:

Preparing my points in advance, if possible

Practicing engaging in constructive debate with other people

Starting by engaging my CEO one-on-one, at least initially

Using a questioning rather than an accusatory tone

Putting aside my own ego when challenged

Having the confidence to seize the next moment that presents itself to constructively engage

Focusing on the situation, not the person

Building trust

This year, I will:

## Harness my passion, yet keep my emotions in check



Does my passion come across as emotion? Do people see me as getting carried away for “the cause”? Do I bring enough of my passion forward in order to inspire and engage people?

I can channel my passion by:

Turning to a trusted colleague or industry peer for venting, not the general staff (and not routinely)

Understanding my own triggers

Watching my body language when upset, which can give away my emotions

Asking a trusted colleague to provide feedback/signals if I am getting too emotional

Starting or participating in a reflective learning group

Taking care of my own stress management/self management and care

Investing in developing my leadership capacity

Remembering to breathe

This year, I will:

## Keep sustainability from being perceived as a pet project



Am I careful to vet sustainability projects and activities to ensure they align with the company's strategy for sustainability? Do I intervene to address well-intentioned side projects that could be a distraction?

I can avoid the appearance of bringing forward or supporting pet projects by:

Establishing key criteria with regard to what kinds of projects fit with the strategy

Assessing projects in terms of materiality and alignment with our strategy for sustainability

Bouncing project ideas off others to see if they see the relevance

This year, I will:

# My change agent development plan

Scan back through the preceding pages and bring forward...

Something I can do in the next month:

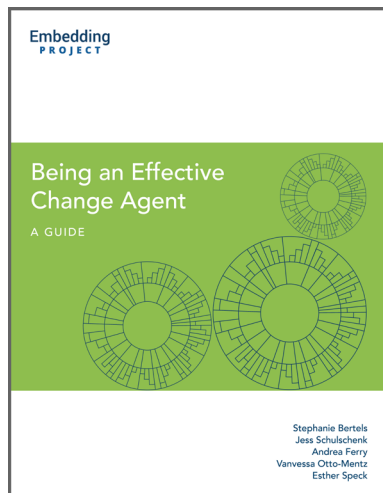
Two things I can do over the next year:

1)

2)

A longer-term investment that will help me grow to be a more effective change agent:

# Other resources



## [Being an Effective Change Agent](#)

You can find more detail about each of these characteristics and the research behind this work in our Being an Effective Change Agent guide.

This guide is based on a review of prior academic research on CEO decision-making, combined with practical experiences and insights gleaned from interviews with over 100 CEOs, board members and sustainability executives.

For more resources to help you embed sustainability, please visit us [online](#).

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