



Change Agent Selection Form

connerpartners⁷

Research and experience from ODR[®]

Introduction

Identifying the appropriate people to function as change agents on a major project is critical to realizing the full benefits of the initiative. The *Change Agent Selection Form* is used to assist sponsors and potential agents in the following ways:

- To select the most qualified change agents to work on a specific change
- To help the candidates understand the sponsors' rationale for selecting or nominating them
- To provide a framework for the continued development of the prospective or selected agent(s)
- To facilitate discussion between the agent and sponsor, and clarify expectations for the agent's performance during a specific change project

Instructions

Change agent selection should be based on a candidate's *current* capability, knowledge, skills, and relationships as they relate to the specific change at hand.

The sponsor should evaluate candidates for a specific change on each of the following 34 statements. In doing so, sponsors should use the following scale:

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

Selection Criteria for Candidates

1. The candidate is considered extremely competent in his or her present job duties.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

2. The candidate is perceived as a valuable person to the organization and is seen by others as highly credible.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

3. The candidate does not have a history of conflict within the organization that would generate a political liability for the project.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

4. The candidate has earned sponsor trust and respect.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

5. The candidate genuinely wants to be involved in the project.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

6. The candidate maintains an image of confidentiality, trust, and loyalty toward key people and the organization.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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7. The candidate is able and willing to delegate or transfer some portion of current duties to facilitate participation in the change process.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

8. The candidate demonstrates a high tolerance for ambiguity.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

9. The candidate demonstrates a high degree of self-confidence without appearing arrogant.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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10. The candidate thrives on challenge while avoiding stress levels associated with "burnout."

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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11. The candidate appears comfortable and effective when working in unstructured environments.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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12. The candidate demonstrates a proactive, initiating profile in most situations.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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13. The candidate balances initiative with patience.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

14. The candidate does not require constant guidance, yet takes feedback well without fighting guidance.

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15. The candidate is creative and open to new ideas when approaching problems or opportunities.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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16. The candidate trusts his or her own instincts enough to invent solutions for problems never before encountered.

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17. The candidate is achievement-oriented (sets goals, solves problems, and shows persistence).

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18. The candidate knows how to work autonomously.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

19. The candidate can generate alternative perspectives on an issue.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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20. The candidate is aware of and knows how to utilize the formal and informal power structure within the organization.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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21. The candidate demonstrates a capacity to influence others without overuse of control.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

22. The candidate demonstrates advanced listening skills.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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23. The candidate demonstrates advanced interpersonal communication skills.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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24. The candidate demonstrates conflict management skills.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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25. The candidate demonstrates advanced group dynamic and facilitation skills.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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26. The candidate is able to conduct effective presentations before groups of 25 to 50 people.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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27. The candidate clearly values analysis.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
1	2	3	4	5	6	7	8	9	10

28. The candidate demonstrates planning skills.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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29. The candidate is able and willing to confront difficult issues and play “hardball” when necessary.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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30. The candidate has a working knowledge of how people and organizations change, as well as how they resist change.

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31. The candidate understands the importance of the organization's culture and its relationship to the change.

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32. The candidate has change-related education and experience.

Accurately reflects the candidate's current capability						Does not accurately reflect the candidate's current capability			
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33. The candidate places value on the human as well as the technical aspects of the change and understands how each is dependent on the other.

Accurately reflects the candidate's current capability	Does not accurately reflect the candidate's current capability										
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1	2	3	4	5	6						
7	8	9	10								

34. The candidate possesses the willingness and ability to be a team player and work synergistically with others.

Accurately reflects the candidate's current capability	Does not accurately reflect the candidate's current capability										
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border-right: 1px dashed black; width: 12.5%; text-align: center;">1</td> <td style="border-right: 1px dashed black; width: 12.5%; text-align: center;">2</td> <td style="border-right: 1px dashed black; width: 12.5%; text-align: center;">3</td> <td style="border-right: 1px dashed black; width: 12.5%; text-align: center;">4</td> <td style="border-right: 1px dashed black; width: 12.5%; text-align: center;">5</td> <td style="border-right: 1px dashed black; width: 12.5%; text-align: center;">6</td> </tr> </table>	1	2	3	4	5	6	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border-right: 1px dashed black; width: 12.5%; text-align: center;">7</td> <td style="border-right: 1px dashed black; width: 12.5%; text-align: center;">8</td> <td style="border-right: 1px dashed black; width: 12.5%; text-align: center;">9</td> <td style="width: 12.5%; text-align: center;">10</td> </tr> </table>	7	8	9	10
1	2	3	4	5	6						
7	8	9	10								

I. Scoring

Step 1: Total the responses to all items.

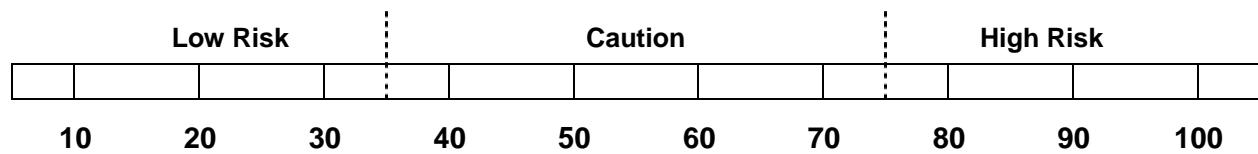
Step 2: Divide the total by 34.

Step 3: Multiply the result by 10 to determine the candidate's change agent potential factor.

$$\frac{\text{Total}}{34} \times 10 = \text{Change Agent Potential}$$

$$\frac{\quad}{34} \times 10 = \quad \text{Change Agent Potential}$$

II. Interpretation of Results: Change Agent Potential



Level of Risk

High Risk: Low Potential (76 and above)

Candidates in this category demonstrate a low potential for performing the change agent role for this specific change. Long-term development in both skills and experience would be required to remediate weaknesses.

Caution: Moderate Potential (36 to 75)

Candidates in this category demonstrate a moderate potential for the change agent role in this project. Specific development plans should be collaboratively designed between the sponsor and agent to maximize potential and minimize specific concerns. Ongoing monitoring of agent performance and development will be required.

Low Risk: High Potential (10 to 35)

Candidates in this category reflect the majority of skills and experience required to successfully perform the change agent's role on this specific change. The sponsor and agent should highlight any specific dimension that may be of concern for attention and development.

III. Interpretation of Results: Individual Items

Plot the score for each characteristic on the grid below and connect the dots with a line.

Characteristics	1	2	3	4	5	6	7	8	9	10
1. Current Competency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Value/Credibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. History of Conflict	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Sponsor Trust/Respect	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Willingness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Confidentiality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Availability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Tolerance for Ambiguity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Self-Confidence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Challenge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Structure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. Initiative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. Balance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. Guidance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15. Creativity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16. Problem Solving	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17. Achievement Orientation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18. Autonomy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19. Perspective	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20. Power	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
21. Influence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22. Listening Skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
23. Communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
24. Conflict Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
25. Group Dynamics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
26. Presentation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
27. Analysis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
28. Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
29. Confrontation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
30. Change Knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
31. Culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
32. Change Education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
33. Human/Technical Aspects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
34. Synergy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	I Low Risk			II Caution				III High Risk		

Key Questions to Be Discussed by Sponsor and Candidate

- What proportion of the candidate's time will be devoted to change agent activities?
- What is the anticipated time frame for and duration of this change agent assignment?
- How will this additional responsibility affect the candidate's current job duties?
- What tasks may be delegated, transferred, modified, and so forth?
- How will the candidate's change agent activities be addressed in his or her annual performance rating?
- How can the sponsor ensure that the candidate's boss will be supportive of change agent activities?
- What are the specific areas of concern identified to improve the development of the change agent candidate's performance?
- What specific developmental activities will be helpful for each area of concern identified for improvement?