

Sequences & Scenarios for Fearless Change

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This paper summarizes some ways to chunk the large collection of Fearless Change patterns in a way that helps readings learn, understand and use them. These include categories, illustrations, experiences, sequences, and scenarios. We offer these to our readers for evaluation, and ask what works, what doesn't, what more do we need?

Categories and Subject Descriptors

Fearless Change patterns

General Terms

Patterns, Sequences, Scenarios

Additional Keywords and Phrases

Categories, Illustrations

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Introduction

Shortly after the publication of *Fearless Change: Patterns for Introducing New Ideas* (2005) [1], readers began to comment on the need to “categorize” the large collection of patterns. The requests seemed to amplify when the collection grew to 64 patterns in the second book, *More Fearless Change: Strategies for Making Ideas Happen* (2015) [2]. Even though the book authors (Manns & Rising) put a lot of effort into defining the context and problem statement for each pattern, the large number made it difficult for people to learn and understand what pattern to use first, next, and next—there were just too many options. This may be similar to tools in a toolbox—we will have our favorites that we use over and over (for example, hammer and screwdriver) but if the box is too full with too many other tools, we may become overwhelmed with the many options and therefore simply use only a few of the tools that we know well. One can imagine that this may be similar to what is happening with the “tool box” of Fearless Change patterns—users may have their favorites and may not use the others because there are too many to learn.

We, the authors of the Fearless Change patterns books, have often been asked to diagram the “one way” to use all the patterns. However, we have tried to explain that there is no “one path” through the patterns. The path that the user begins and what he or she does next depends on the particular problem(s) that person is facing. While there may be some similarities, one must recognize that because each organization is different, every context is different, and because everyone’s goals are different, the path every leader of change will take is different. Therefore, the “one way” to organize the patterns likely does not exist; rather, it is valuable to provide different views and perspectives to learn and use patterns.

We look to Christopher Alexander’s concept of “quality without a name” (QWAN) for some guidance. In his *Timeless Way of Building* book, he argued that we should seek to include a nameless quality in things we build. In his effort to add beauty and life, he highlighted pattern languages and focused on an unfolding process that can be found throughout nature. This process begins with describing each individual pattern as “a thing, which happens in the world, and the rule which tells us how to create that thing, and when we must create it” [3]. But this is not enough. While each pattern captures a timeless practice, Alexander argues for a timeless process for how the individual patterns are structured into a pattern language, for how they are used to create things, and just as importantly, for how the individual patterns and the languages are kept alive by the community who uses them. Therefore, an examination of various methods for organizing the patterns provides benefits for not only those learning the patterns, but also helps to keep the patterns and pattern languages alive and adds to the QWAN they offer.

Along with our Fearless Change readers, we and others have tried a variety of methods for organizing our patterns and for showing how they can be used. These are included in this paper, as follows:

- putting patterns in categories
- drawing illustrations
- writing “experiences” stories
- creating sequences
- creating scenarios

This paper will examine these various methods and discuss some of the tradeoffs. The goal of this paper is to explore some ways to make the Fearless Change patterns easier to learn, navigate, and use.

Categories

It is natural for people to group larger things into something that can organize and find relationships between them. Pattern authors and others have been categorizing or classifying patterns and pattern languages since their beginnings. For example, the GoF *Design Patterns* (1995) [4] included 3 categories Creational, Structural, and Behavioral for the 23 patterns. Since that time there have been various people that have created other

categories such as Kardell¹ who proposed a different classification with four groupings: Purpose, Applies, Scope, Time to Apply. Depending upon their view, different people find value with different categories.

Another example can be seen from *Fearless Change: Patterns for Introducing New Ideas* (2005) [1] which included 4 categories for these patterns (Throughout, Early, Later On, Resistance). Table 1 includes a subset of these categories as an example. A complete list of this categorization can be found in the Appendix of the *Fearless Change* book.

Theme	Pattern Name	Summary
Throughout	Evangelist	To begin to introduce the new idea into your organization, do everything you can to share your passion for it.
Throughout	Small Successes	To avoid becoming overwhelmed by the challenges and all the things you have to do when you're involved in an organizational change effort, celebrate even small successes.
...
Throughout	Time for Reflection	To learn from the past, take time at regular intervals to evaluate what is working well and what should be done differently.
Early	Ask for Help	Since the task of introducing a new idea into an organization is a big job, look for people and resources to help your efforts.
...
Early	Tailor Made	To convince people in the organization of the value they can gain from the new idea, tailor your message to the needs of the organization.
Later	Big Jolt	To provide more visibility for the change effort, invite a high profile person into your organization to talk about the new idea.
Later	Corporate Angel	To help align the innovation with the goals of the organization, get support from a high level executive.
...
Later	Token	To keep a new idea alive in a person's memory, hand out tokens that can be identified with the topic being introduced.
Resistance	Bridge-Builder	Pair those who have accepted the new idea with those who have not.
Resistance	Champion Skeptic	Ask for help from strong opinion leaders, who are skeptical of your new idea, to play the role of "official skeptic." Use their comments to improve your effort, even if you don't change their minds.
...

Table 1: Example of categories from "Fearless Change" book (2005).

This grouping, as well as other over-simplified schemes, were difficult to create because they were open for interpretation. The process prompted endless discussions on the exact definition of each category as well as the clear lines between the categories. In addition, many patterns could fit into more than one category, but again, this was open for interpretation.

¹ (<https://people.cs.umu.se/jubo/ExJobs/MK/patterns.htm>)

This can also be seen in the Agile Quality patterns [5]. The authors of these 23 patterns included four categories (Core, Becoming Agile at Quality, Identifying Qualities, and Making Qualities Visible). They have also had many workshops with various people from different roles and organizations. The results yielded a collection of categories. They have all included good insights but vary depending upon the group of people and their background. Different groups found value in various different categories.

When we consider that different people do not create the same categorial scheme for the same collection of patterns, we wonder if the process of categorizing has the most value for the person who is doing it. Manipulating the patterns in this way can be a useful method for carefully examining and learning the patterns. However we wonder if the final groupings have the same value for others who were not involved in this process or come from a different background.

Illustrations

Many pattern authors and those using patterns have created **illustrations** to group patterns together and show relationships between them. For example, Scrum Patterns included a pattern map [7]. The Fearless Change readers have drawn **illustrations** on their own to show the potential relationships and connections between the patterns. We show two examples.

Figure 2 is a structured diagram that illustrates the Evangelist and Dedicated Champion patterns at the center with the branching lines labeled to indicate the tasks this role does to make change happen. For example, the illustrator sees “spreads message widely” as one of these tasks that can be accomplished with the Brown Bag, Location Location Location, and Big Jolt patterns. A branch from these three patterns indicates that one can “increase impact” with Next Steps, Token, Do Food, Royal Audience, Hometown Story.

In Figure 3, a mindmap appears to show the illustrator’s perception of how the patterns are related. For example, the illustration shows that when one uses the Ask for Help pattern, they should also use Just Say Thanks (now Sincere Appreciation). In addition, to show an Emotional Connection, one can use the Personal Touch pattern.

Despite the illustration method, we note that the grouping of the patterns are different. Therefore, we again wonder if the process of creating the illustrations has more value for the person making the creation than it has for the people who will view it later.

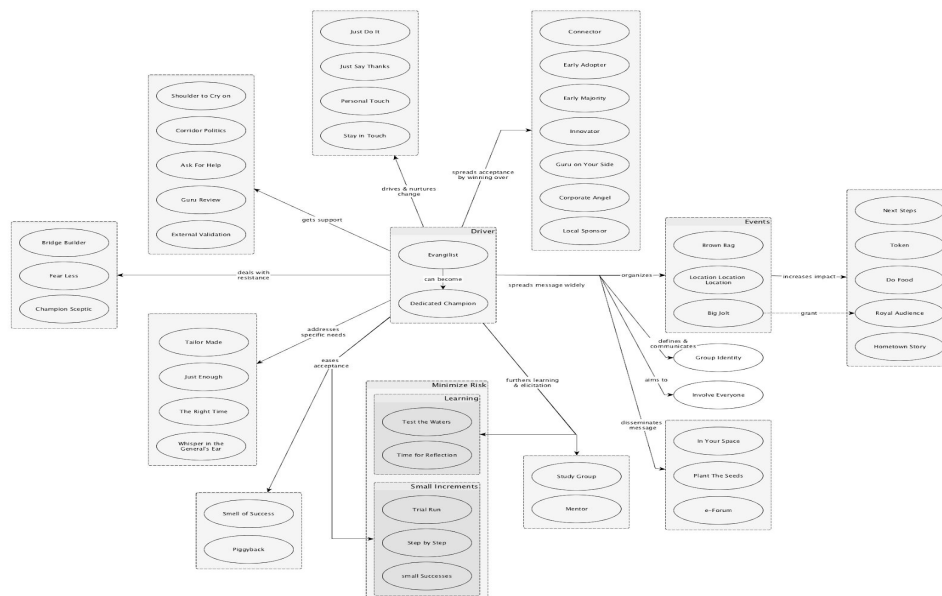


Figure 2: Example of a Fearless Change diagram from Ina El-Kadhi

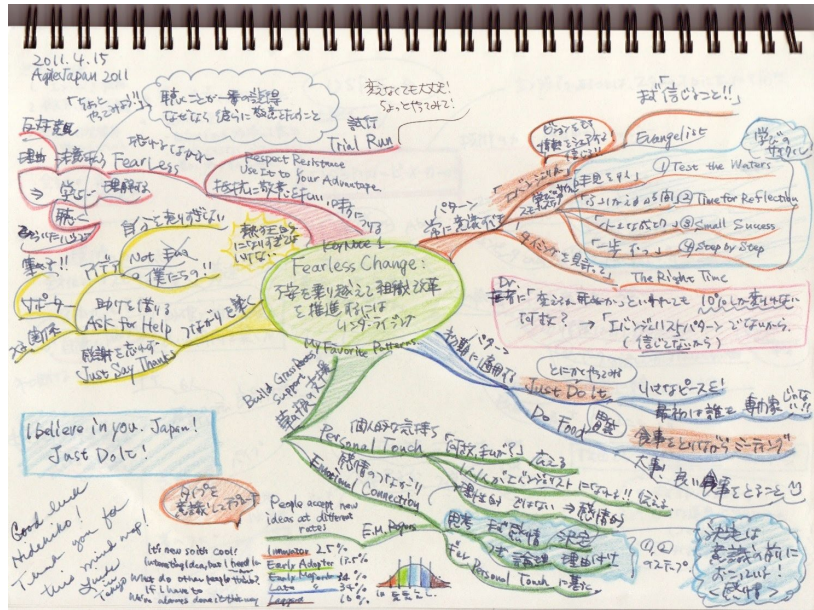


Figure 3: Example of a Mindmap

Despite the many attempts at putting the patterns into categories and drawing illustrations to show the potential connections between the patterns, these methods may not always have the benefits our readers are seeking. Perhaps this was because an illustration can appear complicated to people who did not create it. In addition, the categories are simply static “buckets” that may not show how to actually use the patterns. Even though they are from the perspective of the person creating the drawings, we still see people who are new to Fearless Change playing around with these methods—there is something in all of us that likes to draw pictures or put things in categories. Therefore, they do seem to provide some value for people who create them.

Experiences

In order to provide less static, more dynamic, ways to learn the patterns, “Experiences” were included in both of the two Fearless Change books. A portion of an Experience Report from *Fearless Change* (2005) appears below. Others can be found in *Fearless Change* (2005) [1] and *More Fearless Change* (2015) [2].

Customer Training Experience Report

The following story is from a colleague who wishes to remain anonymous

The customer training department of a major avionics company hired me to create an online version of their traditional classroom training [**Dedicated Champion**]. Although they really weren't sure what their online avionics training would look like, they seemed to think that it would probably be some kind of self-paced, computer-based, training delivered over the Internet. I had something different in mind. I began to talk about the notion of a virtual classroom.

I wasn't sure they really understood what I was talking about, so I arranged for some of our instructors to visit a company that specializes in technical training delivered in online classrooms [**Personal Touch**]. The helpful folks at this company guided us through their studios and explained how their online courses are structured and delivered. They have a very successful instructional model that they can apply to any topic they are teaching [**External Validation**].

Our instructors were very impressed with what they had seen. When we returned to our workplace, they talked about how we might be able to develop live online classes. They talked about scheduling meetings to explore the concept.

Excerpt from one Experience Report in *Fearless Change* (2005), pg 101

The purpose of these experiences is to give readers an idea of how they could use the patterns. However, because these multi-page stories are specific to a well-defined situation, we now wonder if our readers can easily abstract them to other situations they are facing. Sometimes readers find them very useful but at other times readers do not necessarily relate the stories to their unique situation. However, we have seen that experiences may be more useful than categories or illustrations for learning the patterns because they walk you through some steps for using the patterns together.

Sequences

Sequences have been discussed and used by Christopher Alexander in *A Pattern Language*. As noted in "Patterns as Structure, Process, and Community" [6]:

"Alexander believes that quality cannot be built with an isolated pattern, but rather with an entire system of patterns that are interdependent at many levels. In Alexander's language, the structural relationships between the patterns prompt sequences. Alexander has outlined importance of sequences with examples² that move from larger to smaller patterns, such as those that create regions (e.g. Identifiable Neighborhood (14), Activity Nodes (30)) and the buildings in those regions (e.g. House For A Couple (77), Individually Owned Shops (87)), to those that are concerned with various levels of details that embellish the structures (e.g. Alcoves (179), Final Column Distribution (213))".

Alexander uses the idea of a "sequence" to teach designers and builders how to construct a coherent artifact. Without some ideas on how to sequence one's design thoughts, the underlying pattern language is likely to be mostly a diagnostic tool.

The authors of the *Scrum Patterns* added sequences to their book in order to help readers begin to comprehend the 94 patterns within 2 pattern languages [7]. The 4 sequences (2 for each language) include a set of steps through the patterns. The authors believe these are useful for teaching people not only the patterns but a sequence of steps for applying the patterns as they evolve their organizations.

In an effort to provide smaller and more general chunks of patterns working together to address problems, we (authors of *Fearless Change* patterns) began to explore **sequences** as another method for grouping the patterns. Sequences are a list of patterns that define an action which can then be used in many different ways and contexts. The patterns can be arranged in a linear, branching, or looping way. The *More Fearless Change* book included one sequence.

Sequence: Learning cycle

Just Do It
Take a Baby Step
Take Time for Reflection
Celebrate Small Successes
Loop back to next Baby Step

Even though this particular sequence is in its own way a "pattern of patterns," it can also be used in many different contexts. As a result, you will see it over and over again. And since it is labeled, users have a better chance of remembering it and using it. In addition, this sequence provides a "handle" on the individual patterns themselves.

² <http://www.patternlanguage.com/sequences/sequences.html> and <http://www.patternlanguage.com/sequences/otherinfo/intro.html>

We have recently been examining sequences in more detail and have outlined some useful sequences we have seen below. They include sequences for: Before Starting, Starting, Promote, and Resistance. Note that some sequences have conditional steps and loops as well as steps that can be done alternatively or in parallel.

Sequence: Before starting

Know Yourself
Create an Evolving Vision
Become an Evangelist

Sequence: Starting

Evaluate your *Evolving Vision*
Take a Baby Step with a Concrete Action Plan
Take Time for Reflection
(repeat back to Baby Steps until done)
Keep a Sustained Momentum by going back to Evolving Vision if needed

Sequence: Promote

Elevator Pitch
which includes Wake-Up Call and Evolving Vision
Can also do any of the following:
Create a Hometown Story
Build an e-forum
Hold a Town Hall Meeting which can include Do Food
Attempt to Piggyback on other gatherings to Elevator Pitch
Keep a Persistent PR

Sequence: Resistance

Create an Emotional Connection with any of the following:
Hometown Story
Imagine That
Personal Touch
Give people a Shoulder to Cry On
Practice Fear Less
Ask for Help
Give Sincere Appreciation
Involve Everyone

Linda Rising provides the following analogy for sequences:

Karl and I took a dance class with a new instructor. She taught Cha-Cha in a somewhat different way. We've had several Cha-Cha classes with other instructors. They all have done pretty much the same thing: they teach a step, then they teach another step — a bit like the way we talk about the patterns — each as a stand-alone piece. Of course, the instructors (and we do the same with the patterns) mention that the steps are not stand alone Band-Aids out of the box but are used together and they (and we) give examples of that.

The problem Karl and I have is that we have now taken so many Cha-Cha classes and have learned so many steps that we can't remember them. Sometimes we can't remember them at all — other times, we can remember some pieces of some of the steps but not well enough to use them when we dance.

The new instructor taught a complete dance routine. The routine was made up of steps — some of which we already knew, others were brand new. The routine was taught from the beginning in each

class. The goal was to have a complete dance routine — a sequence of steps — by the end of the six-week class. Of course, he was quick to say that we could change the routine and, of course, we all knew the individual steps, so they could be done in any sequence or removed completely.

The amazing thing was that after that class we do a better job of remembering the individual steps as well as the whole routine. And, of course, we gave the routine a name — Cha Cha I :-)!

We have seen that it is worthwhile to encourage our readers to create their own sequences. In Fearless Change workshops, we often start with asking participants to define the challenges they are facing in their efforts to make change happen. They are then given a collection of papers, with each one containing a short summary of a pattern and are encouraged to play with these in order to find the series of patterns (the sequence) that will address their particular challenge(s). They create their own sequences and can take these sequences home as a reminder of what they can later. The Fearless Journey game³ has formalized this process with a printed collection of cards that can be downloaded by teams who are “stuck” — the game is used to get them “unstuck”. Recently, in response to the Coronavirus, some individuals have moved this game to an online version.

Scenarios

While sequences hold promise as an effective way to remember and eventually use the Fearless Change patterns, we decided to take this a step further by forming the sequences into **scenarios**—short stories that include sequences. Unlike “experiences” (explained above), scenarios can be easily abstracted and used in many different contexts. For example, the Learning Cycle sequence can be formed into a scenario as follows:

I need to continue learning (Sequence: Learning Cycle)

Continue to **Just Do It** — take a **Baby Step** with something you believe will move the change initiative forward. While you do this, take **Time for Reflection** at periodic times. What is going well that you want to continue? What is not going well that you need to pivot? Celebrate your **Small Successes**. Continue this learning cycle by taking the next **Baby Step**.

This takes the Learning Circle sequence of patterns a step further by putting it into an actionable form with verbs and sentences that generally explain what to *do* anytime you feel you need to continue learning. These segments are general enough that they can be used in different contexts by a variety of change leaders that are facing their own unique challenges.

Other examples of scenario stories for the sequences in the previous sections follow.

Where do I start? (Sequence: Starting)

You have an idea for a change or you have been appointed to lead a change. You want to make it happen, but where do you start? You may think you need a specific plan—however, a plan is much easier to create than to follow. This is because change happens one complicated and unpredictable person at a time—you cannot be certain how quickly they will accept the new idea and be willing to take action. Therefore, rather than writing a detailed plan that may or may not work for the many different types of people you need to persuade, take a “learning cycle” approach. To do this, start with an **Evolving Vision**—define your end goal. Then move forward with small, short-term **Baby Steps** towards making the vision happen. Along the way, review your *Evolving Vision* at periodic times to determine if you need to change it (after all, this is why it’s called “evolving”). We don’t mean to make this sound easy. Change is not an event—it is a process, and keeping your **Sustained Momentum** can be a long, arduous process. But you can maintain optimism and enthusiasm by

³ <https://fearlessjourney.info/>

celebrating the **Small Successes** along the way—this helps you, and your team, focus on what you have accomplished rather than the many things you still need to do to make the change happen.

I need to get the information out (Sequence: Promote)

Begin by creating your **Elevator Pitch** to introduce the new idea every time you get a brief opportunity. The few sentences can include a **Wake-Up Call**, the proposed solution, and the **Evolving Vision**. The purpose is to intrigue people to request more information—when they do, try adding a **Hometown Story** that stirs the imagination of your listener. Create an **e-Forum** to share updates, but keep talking too. Use a **Personal Touch** to answer questions and help individuals understand how the change will affect them personally. Hold periodic events such as an informal Brown Bag lunchtime discussion and a more structured **Town Hall Meeting** to report progress and solicit feedback. If you can **Do Food**, you are likely to increase the attendance. Look for opportunities to **Piggyback** with a few minutes on the agenda of meetings and other gatherings. People are busy so keep a **Persistent PR**—design a variety of creative ways to periodically and consistently capture attention, inform, and remind people that change is coming.

I've told people about the idea but they aren't accepting it (Sequence: Resistance)

When you explain the new idea, you will likely see some nodding. This shows that listeners are starting to understand it... good work!... but it is only your first step. When we understand a new idea, this does not necessarily mean we are persuaded to accept it and take action. Humans are not completely rational beings—we make our decisions, at least in part, on beliefs that often seem irrational to others—in other words, on how we feel. Therefore, you can't simply provide logical “facts” and expect everyone to agree. You must also help people develop an **Emotional Connection** to the change. You can do this in many ways. When you share information, think about how you can include a **Hometown Story**, or an **Imagine That** exercise, that will be more memorable and inspirational than a random collection of facts. You can use a **Personal Touch** with any individual to discuss how the new idea will personally help him/her. And, since a change involves both gain and loss, provide a **Shoulder to Cry On** to recognize what people are losing. For the stubborn skeptics, ease the fear both of you are feeling with the **Fear Less** strategy—rather than trying to convince them, listen to their concerns. The skeptic will feel more respected and you may learn something you hadn't considered. Continue to **Ask for Help** and follow it with **Sincere Appreciation**—when you extend invitations that **Involve Everyone**, you encourage people to feel they are a valuable part of building the exciting Group Identity around the change initiative.

Other scenarios were created and added to the Fearless Change website⁴. We think these short scenarios have potential to help our readers learn and use the patterns. Unlike categories or in an illustration, scenarios chunk the patterns with familiar challenges that can show our readers how to actually use the patterns.

Conclusion

In writing the *Fearless Change* and *More Fearless Change* books, the authors were cognizant of the importance of tying patterns together, in a language or network. Therefore, we thought of many possible connections when writing the context, solution and consequences sections of each pattern. We think the goal for **sequences** and **scenarios** is different and more useful – to drill down the possibilities for use, not to include all the connections. Here are few points to consider as we evaluate these two methods:

- Every pattern may not need to be in a sequence or scenario. *Fearless Change* has a lot of patterns and most folks have trouble remembering them—so the goal is to help people remember more than they do now, not to categorize every pattern.

⁴ <https://fearlesschangepatterns.com/resources>

- Some sequences and scenarios are trying to do too much like the kitchen sink dilemma—every possible pattern that could be used for a given situation. The idea is to have small chunks that help people remember. Yes, we always want to remember to use Personal Touch — putting that into the “carry-on bag” sequence should address that – but the authors suffer from knowing too much and it's really easy to get carried away. We want to drill down and create very small chunks that others can remember.
- Some patterns may not be as important as others. We may want to focus on the best, most useful patterns. People can always look up others as needed once they have a few sequences and/or scenarios to help them get a handle on the patterns.
- The sequences and scenarios can tie the patterns together, as long as we don't get carried away and include every possible pattern that could apply.

This paper summarized ways to chunk the Fearless Change patterns in order to help readers learn, understand and use them. Writing and using patterns is much more than simply learning the individual ones. To successfully apply the patterns, it is useful to know the connections between them. These connections can be static as in the case of categories and illustrations or can show process as in sequences and scenarios. To create these connections, we borrow from Alexander who encourages keeping patterns “alive” with input from the community. This means that the community needs to have a feedback loop for keeping the patterns and the languages alive, as well as providing means for adding new sequences and scenarios to encourage more pattern use. This is an important exercise for continually growing and sharing knowledge with patterns.

We think that the process of creating categories and illustrations is a useful exercise for people who are trying to learn the large collection of patterns, but we wonder if their creations are useful for others. The act of creating categories and illustrations is likely to continue to be a beneficial exercise for people new to the patterns, while those who have more experience with the patterns can evolve and write sequences and scenarios. We believe the small chunking of patterns in sequences and scenarios hold the most promise for not only learning and remembering the individual patterns and the relationships between them, but even more importantly, for understanding when and how to use them together. We offer these to our readers for evaluation, and ask what works, what doesn't, what more do we need?

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Appendix A: First Draft of other Potential Sequences

(We plan on evolving these later after the PLoP 2020 writers workshop)

We are not intending these for review or feedback now. Rather these sequences have been included as examples of sequences that we can evolve later.

Before you start

Know Yourself
Evangelist
Evolving Vision

Carry-on bag

Personal Touch
Emotional Connection
Ask for Help/Sincere Appreciation
Baby Steps
Stay in Touch
Sustained Momentum

Get off the ground

Just Do It
Low Hanging Fruit
Piggyback
Just Enough
Guru on Your Side
Elevator Pitch
Trial Run
Innovator
Concrete Action Plan

Learning cycle

Just Do It
Baby Steps
Time for Reflection
Small Successes
Sustained Momentum

Spread the word

Elevator Pitch
Persistent PR
External Validation
Town Hall
Big Jolt
Connector

Learn with others

Study Group
Guru Review
Brown Bag
Town Hall

Get people to care

Emotional Connection
Personal Touch
Wake-Up Call
Imagine That!
Accentuate the Positive

Build a team

Ask for Help/Sincere Appreciation
Future Commitment
Group Identity

Meeting resistance

Fear Less
Small Successes
Hometown Story
Pick Your Battles
Myth Buster
Easier Path
External Validation
Champion Skeptic
Bridge Builder
Trial Run
Shoulder to Cry On
Smell of Success
Corridor Politics
Do Food
Guru Review

Moving forward

Group Identity
Involve Everyone
The Right Time
Future Commitment
Guru on Your Side
Guru Review
Trial Run
Hometown Story
Brown Bag
Early Adopter

Scenario: Managers & Executives

Local Sponsor
Corporate Angel
Tailor Made
External Validation
Whisper in the General's Ear
Scenario: Keep Learning
Brown Bag
Study Group
Town Hall Meeting
Trial Run
Big Jolt

Publicity & Marketing

Accentuate the Positive
Big Jolt
Connector
Elevator Pitch
Town Hall Meeting
Wake-Up Call
Imagine That
Persistent PR
Next Steps
Royal Audience
Brown Bag
Location, Location

Influential people

Guru on Your Side
GoTo Person
Early Adopter
Early Majority
Mentor
Local Sponsor
Corporate Angel
Innovator
Connector

Scenario: Influence strategies

Trial Run
Corridor Politics
Token
Whisper in the General's Ear
Easier Path
Hometown Story
Bridge Builder
Ask for Help/Sincere Appreciation
Brown Bag