

# WHY MOST CHANGE EFFORTS FAIL AND WHAT YOU CAN DO DIFFERENTLY

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**Shennandoah Goodson, MSODL**  
Director, Endeavor Management  
sgoodson@endeavormgmt.com

## ACCOUNTABILITY/ ACTION ITEMS

Suggested Action Steps:

1. Conduct a personal connection audit on your contacts at the client firm. From your audit identify three action steps to take to create a more personal connection.
2. Consider your roster of clients. Do you have any in similar industries, roles, or situations? How can you bring them together to network and learn?
3. Identify your current clients top 3 competitors. What threats do the competitors pose to your client? What opportunities do you see? How can you pair your findings with your firm's offerings?
4. What other firms does your client hire (legal, real estate, staffing, architect, etc.)? Reach out to contacts at those firms and set up meetings. Start exploring mutually beneficial referral relationships.
5. Connect with subject matter experts in each service area of your firm and ask for training on their service line.

## SUGGESTED READING

- [“How to Electrify Your Client Relationships”](https://www.forbes.com/sites/dorieclark/2012/07/02/how-to-electrify-your-customer-relationships/#7a3d9d6371e3) *Forbes*, <https://www.forbes.com/sites/dorieclark/2012/07/02/how-to-electrify-your-customer-relationships/#7a3d9d6371e3>
- [“When Senior Managers Won’t Collaborate”](https://hbr.org/2015/03/when-senior-managers-wont-collaborate) *Harvard Business Review*, by <https://hbr.org/2015/03/when-senior-managers-wont-collaborate>
- [“Earning a Return on Your Relationship Fund”](https://bluecanyonpartners.com/insight/earning-a-return-on-your-relationship-fund/) *Blue Canyon Partners*, <https://bluecanyonpartners.com/insight/earning-a-return-on-your-relationship-fund/>
- *Endless Referrals* by Bob Burg
- *CoDestiny: Overcome Your Growth Challenges by Helping Your Customers Overcome Theirs* by Atlee Valentine Pope and George F. Brown Jr.
- *Trust Agents* by Chris Brogan and Julien Smith
- *Blue Ocean Strategy* by W. Chan Kim
- *The Nordstrom Way to Customer Service Excellence* by Robert Spector and Patrick D. McCarthy
- *Customer Satisfaction is Worthless Customer Loyalty is Priceless: How to make customers love you, keep them coming back, and tell everyone they know* by Jeffrey Gittomer

## Personal

- 1.
- 2.
- 3.
- 4.
- 5.

## Educate

- 1.
- 2.
- 3.
- 4.
- 5.

## Connect

- 1.
- 2.
- 3.
- 4.
- 5.

**Brainstorm 3-5 action steps for each category**

# Point of Inflection:

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## Touchpoints



Touchpoint 1:

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## Stewards



Touchpoint 2:

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Touchpoint 3:

## Needs

- 1.
- 2.
- 3.
- 4.
- 5.

## Transformation

- 1.
- 2.
- 3.
- 4.
- 5.

## Action

- 1.
- 2.
- 3.
- 4.
- 5.

### Journey Mapping Activity – Step 3

Functional and Emotional **needs**.

**Transformation** required.

Source of **resistance** and leadership **actions**.

# BE THE SOLUTION



Operations	Competitors	Supply	Goals	Services	Customers