Introduction to the Executive Interview Guide Template

The Executive Interview Guide is used to assess executive leaders involved in the change initiative. It helps the Practitioner to:

* Foster initial relationship building between the OCM Practitioner and executive leaders
* Instigate though among executive leaders about what is required for a successful change initiative
* Identify the political “lay of the land”, which helps the project team navigate potential political issues and boundary struggles
* Build a picture of the executive leaders’ strengths, questions, and possible problems related to the change initiative

The guide covers topics such as background information, prior experience with change and change leadership, vision and strategy, and political and team dynamics.

Instructions and descriptions are provided to help the reader understand each section’s purpose and how to complete it.

Template style conventions are as follows:

| Style | Convention |
| --- | --- |
| Normal text | Indicates placeholder text that can be used for any project. |
| [Instructional text in brackets] | Indicates text that is be replaced/edited/deleted by the user] |
| *Example text in italics* | *Indicates text that might be replaced/edited/deleted by the user* |

As you complete the template, please remember to delete all instructional text (including this section) and update the following items, as applicable:

* title page
* version history
* table of contents
* headers
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Update the document to a minor version (e.g., 1.1, 1.2) when minimal changes are made and a major version (e.g., 2.0, 3.0) when significant changes are made.

Executive Interview Guide

[The OCM Practitioner should utilize the Executive Interview Guide to facilitate discussions with all executive leaders who may influence or who may be impacted by the project. The guide contains suggested questions posed in a suggested order; however, the OCM Practitioner may tailor discussions based on each executive leader. The following four sections contain suggested questions regarding background information, prior experience with change and change leadership, vision and strategy and political and team dynamics. The OCM Practitioner should be sensitive to the executive being interviewed and the Practitioner’s relationship with that executive. Some questions may not be appropriate for all executives. The OCM Practitioner should use his/her knowledge of and relationship with the executive in making any determinations on removal of questions. The OCM Practitioner may customize this template as needed to ensure adequate room for question responses.

**Note: The content collected in this template may be sensitive and should remain confidential.**]

# Background Information

[In the table below, record the executive’s responses to the questions listed.]

| Background Information | |
| --- | --- |
| 1. Describe your role, its scope, and how long you’ve been in this role. | [Enter response] |
| 1. Do you perceive a need for dramatic change in the organization? Why or why not? | [Enter response] |
| 1. What do you see as the main strengths and weaknesses of the organization / organizational unit? | [Enter response] |
| 1. How would you rate morale? Why this rating? Does the level of morale differ with diverse groups? | [Enter response] |

# Prior Experience with Change and Change Leadership

[In the table below, record the executive’s responses to the questions listed.]

| General Project Information | |
| --- | --- |
| 1. Describe (as a case study) your most exciting/ challenging/ successful experience leading change. | [Enter response] |
| 1. In regards to the previous question, what that experience highly successful, moderately successful, or unsuccessful? Why? | [Enter response] |
| 1. Given your answers to questions 1 and 2, how do you think people at various organizational levels feel about change? | [Enter response] |
| 1. Do you see things you would do differently now given you previous experiences with leading change? | [Enter response] |
| 1. Have you ever been through a change initiative similar to [name of project]? If yes, what was it like? If not, what expectations do you have about what it will be like? | [Enter response] |
| 1. Describe the organization’s / organizational unit’s recent experiences with change? | [Enter response] |
| 1. How do you feel employees would describe their recent experiences with change? | [Enter response] |
| 1. How do you describe your style as a leader? Is this style typical or atypical for the organization? | [Enter response] |

# Vision and Strategy

[In the table below, record the executive’s responses to the questions listed.]

| Vision and Strategy | |
| --- | --- |
| 1. What are your feelings on the organization’s vision and strategy? How well developed is the strategy? | [Enter response] |
| 1. What aspects of the strategy do you fully support? Where do you still have questions or reservations? | [Enter response] |
| 1. On a scale of 1 – 10 (with 1 indicating low and 10 indicating high), how widely known is the vision at the general employee level? | [Enter response] |
| 1. To what degree do employees believe the vision is the right one for the company? | [Enter response] |
| 1. To what degree do your peers support the vision? | [Enter response] |
| 1. What is missing for you in the vision and how it is being carried out? | [Enter response] |

# Political and Team Dynamics

[In the table below, record the executive’s responses to the questions listed. Note: The intent of this section is to find out the leader’s view of the dynamics of interaction and influence within the team. Some leaders will discuss this readily, while some may not. Try to get them comfortable discussing this by explaining why it is important for you to have a clear picture of the political issues in order to make it possible for change to happen.]

| Political and Team Dynamics | |
| --- | --- |
| 1. Is it hard or easy to be heard in the group? Why? | [Enter response] |
| 1. How readily do members of the team express what they really think? How difficult is it to express unpopular views? | [Enter response] |
| 1. How widely supported is the change process within the executive group? Has it been discussed in much depth? | [Enter response] |
| 1. What are the main questions regarding the change process that still divide the group? What causes these divisions or differences in perspective? | [Enter response] |
| 1. Who has the ear of the Project Sponsor? | [Enter response] |
| 1. Who is the ‘loyal opposition’ – willing to take opposing views and generally listened to? | [Enter response] |
| 1. Who are the fence sitters on most issues? On this issue? Why? | [Enter response] |
| 1. If you were going to map the group with regards to trust, who do you trust, and why? Who don’t you trust, and why? | [Enter response] |