Change Management
Syllabus
(Version 1.8 Live)

1 Introduction

Change Management qualifications are currently offered at two levels: Foundation and Practitioner.

This syllabus covers both the Foundation and Practitioner levels of examination. It is based on the 3rd edition of Making Sense of Change Management text by Esther Cameron and Mike Green, issued in May 2012 by Kogan Page ('the Text') and supplementary text from the authors Cameron and Green and the People Alchemy, Alchemy for Managers website. These supplementary materials are collated in the APMG Change Management Practitioner Handbook version 1.4 ('the Handbook').

The Text provides guidance on the principles and practice of managing change and is divided into four separate knowledge chapters: Individual Change, Team Change, Organizational Change and Leading Change.

The primary purpose of the syllabus is to provide a basis for accreditation of people involved with Change Management. It documents the learning outcomes related to the use of Change Management and describes the requirements a candidate is expected to meet to demonstrate that these learning outcomes have been achieved at each qualification level.

The target audience for this document is:
- Exam Board
- Exam Panel
- APMG Assessment Team
- Accredited Training Organizations.

This syllabus informs the design of the exams and provides accredited training organizations with a more detailed breakdown of what the exams will assess. Details on the exam structure and content are documented in the Change Management Foundation and Practitioner Designs.

2 Foundation Qualification

2.1 Purpose of the Foundation Qualification

The purpose of the Foundation qualification is to measure whether a candidate has sufficient knowledge and understanding of the Change Management Text and Handbook to act as an informed member of a change management team during a period of change within part or all of their organization. The Foundation qualification is also a pre-requisite for the Practitioner qualification.

2.2 Target Audience

This qualification is aimed at individuals who are involved in change programmes or organizations going through change, who require a working knowledge of the key principles of change management, who need to know the terminology used and some of the theory behind the practice. It is also the introduction to the higher level Practitioner qualification and therefore includes all those who are the target audience for that qualification..

2.3 High Level Performance Definition of a Successful Foundation Candidate

The candidate should be able to recall, recognize and demonstrate understanding of the theories, concepts, models and approaches outlined in Part One of the text, including terms used, process sequences and roles involved.

Specifically (s)he should be able to demonstrate this understanding by being able to:

- Explain how individuals are impacted by change and different ways they may respond to change situations
- Contribute to development of strategies to help individuals through change, overcome resistance and achieve the desired results from change
- Identify the impact of personality on individual responses to change and on relationships within teams
- Describe and discuss the nature of teams and how they develop and perform in change situations
- Contribute to discussions about how to improve the effectiveness of a team and how it can initiate and adapt to change
- Offer insights on how organizations work and how the process of organizational change happens
- Contribute to development of organizational change strategies by outlining the assumptions, benefits and limitations of different models and approaches that can be used
- Discuss with leaders the different roles that they can play in a change process and the different leadership styles and skills required in different phases of change.

3 Practitioner Qualification

3.1 Purpose of the Practitioner Qualification

The purpose of the Practitioner qualification is to confirm whether the candidate has achieved sufficient understanding of how to apply and tailor Change Management guidance in a given organizational change situation. A successful Practitioner candidate should, with suitable direction be able to start applying the Change Management approaches and techniques to a real change initiative but may not be sufficiently skilled to do this appropriately for all situations. Their individual Change Management expertise, complexity of the change initiative and the support provided for the use of Change Management approaches in their work environment will all be factors that impact what the Practitioner can achieve.

3.2 Target Audience

This qualification is aimed at change managers and aspiring change managers. It is also relevant to other key staff involved in the design, development and delivery of change programmes, including: change leaders (e.g. Senior Responsible Owners), change 'agents' (e.g. Business Change Managers), change implementers (e.g. Programme/Project Managers), change support (e.g. Programme/Project Office) and operational line managers/staff.

3.3 High Level Performance Definition of a Successful Practitioner Candidate

A candidate should be able to use the models and concepts outlined in the Text and the Handbook to understand 'real world' change processes, to offer relevant insights and ideas which can aid decision-taking, and assist in evaluating options. Specifically (s)he should be able to:
- Offer relevant insights in discussions about how to prepare for change, including factors which will increase the probability of a successful outcome
- Help identify individual learning issues affecting change, suggest learning activities appropriate to different individual learning styles, and evaluate the roles in the change process of feedback, coaching and action learning
- Use an understanding of different psychological approaches to propose and evaluate tactics which will help people engage – and remain engaged – with a change process
- Recognize early signs of resistance to change and propose actions to mitigate it

- Identify the impact of individual personality types on responses to change and on team relationships, and to suggest positive ways to make use of such diversity
- Support a range of types of team with insights which will help achieve team effectiveness, including an appropriate role for facilitation of team meetings and processes
- Recognize the development level of a team and help its leaders to respond appropriately
- Use a range of organization paradigms to understand, support and sustain change processes whether these changes are planned, emergent or complex
- Offer an appropriate process framework to help plan or understand any particular organizational change
- Help others understand the difference between organization change and transitions as they affect people, and suggest practical leadership actions at different stages of a change
- Identify issues facing change leaders and offer insights to help them adapt their leadership style and approach to be appropriate to the situation
- Establish a clear framework of roles, skills and activities through which leaders from different levels can support and sustain the change process
- Support the mapping of stakeholders around a change process and help develop ways to build and maintain stakeholder engagement.

4   Learning Outcomes Assessment Model

A classification widely used when designing assessments for certification and education is the Bloom's Taxonomy of Educational Objectives. This classifies learning objectives into six ascending learning levels, each defining a higher degree of competencies and skills (Bloom et al, 1956, Taxonomy of Educational Objectives).

APMG have incorporated this into a Learning Outcomes Assessment Model which is used to provide a simple and systematic means for assessing and classifying the learning outcomes for APMG qualifications.

This structured approach helps to ensure:

- A clear delineation in learning level content between different qualification levels
- Learning outcomes are documented consistently across different areas of the guidance
- Exam questions and papers are consistent and are created to a similar level of difficulty.

The Foundation qualification examines learning outcomes at levels 1 (knowledge) and 2 (comprehension). The Practitioner qualification tests learning outcomes at levels 2 (comprehension), 3 (application) and 4 (analysis).

Change Management Learning Outcomes Assessment Model				
	1.Knowledge	2. Comprehension	3. Application	4. Analysis

Generic Definition from APMG Learning Outcomes Assessment Model	Know key facts, terms and concepts from the manual/guidance	Understand key concepts from the manual/guidance	Be able to apply key concepts relating to the syllabus area to a given scenario	Be able to analyse and distinguish between appropriate and inappropriate use of the method/guidance for a given scenario situation
Qualification Learning Outcome Assessment Model	Know facts, including concepts, terms, principles, model types, approaches and roles.	Understand the concepts, principles, model types, approaches and roles	Be able to apply particular models or approaches relating to the syllabus area to a given scenario. (By implication this must include how a model or approach should not be used.)	Be able to analyse and distinguish between appropriate and inappropriate use of particular approaches and models within the context of the scenario.

5   Syllabus Areas

The syllabus is presented by syllabus areas. This is the unit of learning which may relate to a fragment of the Text or Handbook.

The following syllabus areas are identified.

Syllabus Area Code	Syllabus Area Title
IC	Individual Change
TC	Team Change
OC	Organizational Change
LC	Leading Change

6   Syllabus Presentation

For each syllabus area learning outcomes for each learning level are identified. Each learning outcome is then supported by a description of the requirements that a candidate is expected to meet to demonstrate that the learning outcome has been achieved at the qualification level indicated. These are shown as syllabus topics.

All Foundation level requirements are assumed to have been met for Practitioner level and are not directly assessed again, although Foundation level knowledge and understanding will be used when demonstrating Practitioner application and analysis learning outcomes.

Each of the syllabus areas is presented in a similar format as follows:

Syllabus Area Code PG [2]		Syllabus Area : *Change Management Syllabus Area* (XX) Theme [1]	Foundation	Practitioner	Primary References
Level	Topic				
Know facts, terms and concepts relating to the *syllabus area*. [3] **Specifically to recall:**					
01 [4]	01 [5]	[6]	[7]		[8]
01	02				

Key to the Syllabus Area table

1	Syllabus Area	Unit of learning, e.g. chapter of the reference guide or course module.
2	Syllabus Area Code	A unique 2 character code identifying the syllabus area.
3	Learning Outcome (topic header shown in bold)	A statement of what a candidate will be expected to know, understand or do.
4	Level	Classification of the learning outcome against the APMG OTE Learning Outcomes Assessment Model.
5	Topic Reference	Number of the topic within the learning level.
6	Topic Description	Description of what is required of the candidate to demonstrate that a learning outcome has been achieved at the qualification level indicated
7	Foundation/Practitioner	Shows at which qualification level the topic is assessed. N.B A topic is only assessed at one qualification level.
8	Primary Reference	The main reference supporting the topic.

7   Important Points

The following points about the use of the syllabus should be noted.

7.1   Change Management Guide References

The Change Management Text and Handbook references provided should be considered to be indicative rather than comprehensive, i.e. there may be other valid references within the Text and Handbook.

In practice, at Practitioner level, questions based on a syllabus topic may require knowledge of material from other sections of the Change Management Text or Handbook. This will be clear from the context of the question and the scenario.

Material to support this syllabus is drawn from 2 main sources which are referenced specifically in this syllabus as follows:

- Where material has been drawn from the text, the page numbers have been included to point to specific tables or paragraphs, or reference is made to a range of pages from which the material is drawn. The majority of the references from this book address the content of level 1 and 2 (the Foundation paper) found in the four chapters of Part One. Specific theories that are not examined in the Foundation or Practitioner papers are indicated.   The Practitioner paper also draws on material from the introductions to the book and Part Two; and the two chapters in Part Three.
- Where material has been drawn from additional papers based on original work by Esther Cameron and Mike Green, or from the People Alchemy Ltd website, references are made to the Practitioner Handbook, where formal copyright statements can be seen.

8   Syllabus Exclusions

The textbook, Making Sense of Change Management (3rd edition), contains some text which is potentially misleading and will not examined:

Pages 82-85 – The Leadership issues in Team Change
- Whilst the content of this section of the book is examinable, no question will depend on the sequence of Bion's or Turquet's 'basic assumptions'.

Page 27 Table 1.2 – Theory X and Theory Y
- Earlier printings of this edition of the textbook contain an error in this table regarding the positioning of the statement: "People can be creative and innovative", which SHOULD appear under "Theory Y". No examination question will depend on this misplaced statement.

(Full notes explaining these syllabus exclusions are contained in Appendix A – Notes on Syllabus and Approved Training Materials).

Syllabus Area Code IC		Syllabus Area : **Individual Change**	Foundation	Practitioner	Primary Reference
Level	Topic				
Know facts, including concepts, terms, principles, model types, approaches and roles relating to Individual Change. **Specifically to recall:**					
01	01	The defining features of models which describe how people learn: 1. The learning process and the learning dip; the Gestalt terms 'foreground' and 'background'; the sequence of the learning process (conscious/unconscious incompetence to unconscious competence) 2. The stages and sequence of the 'learning cycle' (Kolb) and the related learning styles	✔		P16-19 P19-22
01	02	The perspectives associated with the behavioural approach to change: 1. The process of conditioning: examples of rewards and punishments (Pavlov and Skinner); examples of financial and non-financial reinforcement strategies 2. Motivation and behavior; the assumptions and factors identified by McGregor and Herzberg (see Appendix A, Note 2)	✔		P22-26 P26-28
01	03	The perspectives associated with the cognitive approach to change: 1. Achieving results and setting goals; the 'well-formed outcome'; the sequence which connects self-concept to results 2. Techniques for changing beliefs and performance	✔		P28-32 P32-35
01	04	The perspectives associated with the psychodynamic approach to change: 1. The sequences and terms used in theories using the idea of a 'change curve' (Kubler-Ross; Adams, Hayes and Hopson) 2. The sequences and terms used in the Virginia Satir model and critical points in the change process (Satir; Weinberg)	✔		P36-40 P40-43
01	05	The perspectives associated with the humanistic psychology approach to change: 1. The levels and terms used in the hierarchy of needs (Maslow) 2. The three 'crucial conditions' to bring about growth and development with individuals within organizations and process of change (Rogers and the path to personal growth) 3. The Gestalt approach to individual and organizational change; the terms used and sequence of the Gestalt cycle (Perls; Nevis)	✔		P47-49 P49-52 P52-55
01	06	The individual personality 'preferences' identified by the MBTI™ and the responses of four types of individuals to change (Myers and Briggs)	✔		P56-59

Syllabus Area Code		Syllabus Area : Individual Change	Foundation	Practitioner	Primary Reference
IC					
01	07	The factors that influence how to manage change in self and others: 1. Propensity for change – five factors (Cameron and Green) 2. The stages and terms used in the transformative change model and factors causing resistance to change (Schein)	✔		P60-61 P61-64
01	08	How managers and change agents can help others to change	✔		P64-67
Understand the concepts, principles, model types, approaches and roles relating to Individual Change. **Specifically to identify:**					
02	01	The elements of theories and models on learning and how they relate to what happens when individuals go through change: 1. The learning process and the learning dip 2. Gestalt ideas of 'foreground' and 'background', and their application to the learning process (conscious and unconscious competence and incompetence); the stages from unconscious incompetence to unconscious competence (Gestalt) 3. The stages and sequence of the learning cycle; different learning preferences/styles and how they relate to the cycle; appropriate learning activities for each learning style. (Kolb)	✔		P 16-18 P 18-19 P19-21
02	02	The elements of theories that underpin the behavioural approach to change: 1. The process of conditioning; the links between rewards and punishments and the reinforcement of behaviour (Pavlov and Skinner); examples of financial and non-financial reinforcement strategies and how they may be used 2. Theory X and Theory Y assumptions (McGregor) (see Appendix A, Note 2) 3. Factors affecting demotivation and motivation at work; use of hygiene factors and motivators (Herzberg)	✔		P22-26 P26-27 P27-28
02	03	The elements of theories that underpin the cognitive approach to change: 1. Connections between values, beliefs, emotions attitudes and behaviour 2. The key questions in achieving results and the use of goals to achieve them: the 'well-formed outcome' 3. Uses of techniques for changing beliefs and performance	✔		P 28-31 P31-32 P32-35
02	04	The elements of theories using the concept of the 'change curve' (also called the 'transition curve') and their application to plot suitable leadership interventions (Kubler-Ross; Adams, Hayes and Hopson)	✔		P36-40 and P66-67
02	05	The stages and key events in the Virginia Satir model and its application to 'critical points in the change process' (Satir; Weinberg)	✔		P40-43

Syllabus Area Code IC		Syllabus Area : Individual Change	Foundation	Practitioner	Primary Reference
02	06	The elements of theories that underpin the humanistic psychology approach to change: 1. The levels in the hierarchy of needs (Maslow) 2. The three 'crucial conditions' for individuals to grow and develop, the process of change and the recurring qualities at each stage; application of the key concepts that emerge in facilitating a change process (Rogers) 3. The Gestalt cycle including aspects of awareness; how the cycle maps on to stages in managerial decision-making (Perls; Nevis)	✓		P47-49 P49-52 P52-55
02	07	The eight MBTI personality preferences and the four types (combinations of 'preferences'); the significant insights these can offer into an individual's responses to a change process	✓		P56-59
02	08	The factors that influence how managers can manage change in their organization: 1. Key elements of the five factors that influence an individual's response to change (Cameron and Green) 2. The principles of the transformative change model and the interventions to reduce learning anxiety (Schein)	✓		P60-61 P61-64
02	09	How learning theories and the different psychological approaches to change (as identified in 0201 to 0206) can be used to help individuals through change		✓	P16-55 and P64-67
02	10	How individual responses to change are impacted by personality preferences and other factors (as identified in 0207 and 0208)		✓	P56-64
02	11	How to support individuals going through change using coaching (GROW model) and supporting techniques: asking questions; active listening; giving feedback		✓	Practitioner Handbook Section 1
Be able to apply particular models or approaches relating to Individual Change to a given scenario. **Specifically to identify:**					
03	01	Appropriate learning activities for individuals with different learning preferences (as identified in 0201) to help them through change		✓	P16-22
03	02	Appropriate responses to situations using the four psychological approaches to change (as identified in 0202, 0203, 0204, 0205, 0206)		✓	P22-55 and P64-67
03	03	How to influence the outcomes of encounters with individuals who have different personality type combinations (as identified in 0207)		✓	P56-59
03	04	Which factors are influencing an individual's response to change, and suggest the appropriate interventions to make transformative change work by reducing learning anxiety (applying 0208)		✓	P60-64
03	05	How to coach individuals using the GROW model and supporting techniques (defined in 0211)		✓	Practitioner Handbook Section 1

Syllabus Area Code IC	Syllabus Area : Individual Change		Foundation	Practitioner	Primary Reference
Be able to analyse and distinguish between appropriate and inappropriate use of particular approaches and models relating to Individual Change within the context of a scenario.					
Specifically to analyse with reasons whether:					
04	01	The use of particular approaches, skills and techniques (as identified in 0301 to 0305) in an encounter between a manager or change agent and an individual is appropriate		✓	P16-67 and Practitioner Handbook Section 1

Syllabus Area Code TC		Syllabus Area : Team Change	Foundation	Practitioner	Primary Manual Reference
Level	Topic				
Know facts, including concepts, terms, principles, model types, approaches and roles relating to Team Change. **Specifically to recall:**					
01	01	The theories and models about the nature of teams: 1. What is a group and when is it a team? (Various) 2. Why we need teams and the relationship between uncertainty and teamwork (Casey) 3. Types of organizational teams (Cameron and Green)	✔		P70-72 P72-73 P73-81
01	02	How to Improve Team Effectiveness. The five elements that contribute to the level of a team's effectiveness or ineffectiveness (Glaser and Glaser)	✔		P82-85
01	03	Tuckman's model of team change and the stages of development that teams go through	✔		P85-91
01	04	Leadership Issues in Team Change. The phases that groups go through and the challenges for leaders (Bion and Turquet) (see Appendix A, Note 1)	✔		P91-94
01	05	How individuals affect team dynamics: 1. MBTI and Teams 2. Similarity and difference between individuals within teams (McCaulley) 3. Team types (Belbin)	✔		P95-97 and P99 Table 2.5 P97-98 P98-101
Understand the concepts, principles, model types, approaches and roles relating to Team Change. **Specifically to identify:**					
02	01	The differences between groups and teams, the need for teamwork, the different types of organizational teams, and how they operate and contribute to change	✔		P70-81
02	02	The characteristics and outcomes associated with each of the five elements that contribute to the level of a team's effectiveness or ineffectiveness (Glaser and Glaser)	✔		P82-85
02	03	The characteristics of each stage of Tuckman's model of team change and how this applies to teams going through a change process	✔		P85-91
02	04	The leadership issues in team change (Bion and Turquet) and the related requirements on team leaders (see Appendix A, Note 1)	✔		P91-94

Syllabus Area Code TC		Syllabus Area : Team Change	Foundation	Practitioner	Primary Manual Reference
02	05	The elements of theories and models about how individuals affect team dynamics: 1. How team members with different MBTI react to one another in teams and their attitudes to change 2. The advantages and disadvantages of similarity and difference between individuals within teams (McCaulley) 3. The contributions and allowable weaknesses of people playing different team roles (Belbin)	✔		P95-97 and P99 P97-98 P98-101
02	06	How team effectiveness can be improved during change using: Glaser and Glaser's five elements (defined in 0202); Tuckman's model of team change (defined in 0203); Bion and Turquet's leadership issues (defined in 0204); the John Adair model; the team leader's role and behaviours; facilitation; and action learning.		✔	P82-94Practitioner Handbook Section 2
02	07	How different types of teams and different individuals within teams affect the way teams react to change (as identified in 0201 and 0205)		✔	P72-81 and P95-101
Be able to apply particular models or approaches relating to Team Change to a given scenario. **Specifically to identify how to:**					
03	01	Improve team effectiveness using the Glaser and Glaser five elements appropriately (applying 0202)		✔	P82-85
03	02	Improve team effectiveness during change by appropriate use of: Tuckman's model of team change (applying 0203); Bion and Turquet's leadership issues (applying 0204); the team leader's role and behaviours; and the John Adair model.		✔	P85-94 Practitioner Handbook Sections 2.1, 2.4 and 2.5.
03	03	Improve team effectiveness by using facilitation and action learning.		✔	Practitioner Handbook Section 2.2 and 2.3
03	04	Improve team effectiveness by recognising and managing the team dynamics of different types of teams and individuals within teams (as identified in 0207)		✔	P72-81 and P95-101
Be able to analyse and distinguish between appropriate and inappropriate use of particular approaches and models relating to Team Change within the context of a scenario. **Specifically to analyse with reasons whether:**					
04	01	The use of particular team building and team leadership approaches (as identified in 0301 to 0304) to help teams to initiate and adapt to organizational change is appropriate		✔	P72-101 Practitioner Handbook Section 2

Syllabus Area Code OC	Syllabus Area : Organizational Change	Foundation	Practitioner	Primary Manual Reference
Level	Topic				
Know facts, including concepts, terms, principles, model types, approaches and roles relating to Organizational Change. **Specifically to recall:**				
01	01	The key beliefs and assumptions associated with the Machine organizational metaphor (Morgan)	✔		P112-113
01	02	The key beliefs and assumptions associated with the Political Systems organizational metaphor (Morgan)	✔		P113-115
01	03	The key beliefs and assumptions associated with the Organisms organizational metaphor (Morgan)	✔		P115-116
01	04	The key beliefs and assumptions associated with the Flux and Transformation organizational metaphor (Morgan)	✔		P117-118 and P145-146

01	05	The underlying principles behind understanding the driving forces and resisting forces in any situation if change is to happen:
		   1. Force Field Analysis, examining the driving and resisting forces (Lewin)
		   2. Three-step model of organizational change (Lewin)
		   3. The factors in the change formula (Beckhard and Harris)
			✔		P120-121
					
					P120-124
					P128-130

01	06	The four phases of planned change that draws on the disciplines of project management (Bullock and Batten)	✔		P124-125
01	07	The Eight Step Model for transforming your organization (Kotter) (Note: Fig.3.3 on P127 is not examined)	✔		P125-126
01	08	The four components in the congruence model that draws on the socio-technical view of organizations and addresses the dynamics of what happens in an organization when we try to change it. (Nadler and Tushman)	✔		P130-133
01	09	The three phases in managing transition and the distinction between planned change and transition (Bridges)	✔		P134-137
01	10	The "principles of environmental systems" for how organizations operate and its relevance to sustaining and renewing organizational change (Senge et al)	✔		P140-143
Understand the concepts, principles, model types, approaches and roles relating to Organizational Change. **Specifically to identify:**				

02	01	How organizations really work and the Machine organizational metaphor (Morgan):
		   1. The use of metaphor to explore different beliefs and assumptions about change
		   2. How change is tackled in the machine metaphor approach, who is responsible and guiding principles
			✔		P108-110, P112-113
					
					P110-111 Table 3.1

Syllabus Area Code OC		Syllabus Area : Organizational Change	Foundation	Practitioner	Primary Manual Reference
02	02	The Political Systems organizational metaphor (Morgan): 1. The use of metaphor to explore different beliefs and assumptions about change 2. How change is tackled in the political systems metaphor approach, who is responsible and guiding principles	✔		P108-110, P113-115 P110-111 Table 3.1
02	03	The Organisms organizational metaphor (Morgan): 1. The use of metaphor to explore different beliefs and assumptions about change 2. How change is tackled in the organisms metaphor approach, who is responsible and guiding principles	✔		P108-110, P115-116, P110-111 Table 3.1
02	04	The Flux and Transformation organizational metaphor (Morgan): 1. The use of metaphor to explore different beliefs and assumptions about change 2. How change is tackled in the flux and transformation metaphor approach, who is responsible and guiding principles 3. Complex responsive processes – managing and enabling complex change using the flux and transformation metaphor (Stacey and Shaw)	✔		P108-110, P117-118, P110-111 Table 3.1 P145-146
02	05	The underlying principles behind understanding the driving forces and resisting forces in any situation and how this can be used to support organizational change: 1. Using Force Field Analysis to examine the change forces and identify the need to augment driving forces and decrease resisting forces (Lewin) 2. Using the three-step model of organizational change to intentionally move towards a new state (Lewin) 3. Using the factors in the change formula to capture the process of change and identify the factors that need to be strongly in place for change to happen (Beckhard and Harris)	✔		P120-121 P120-124 P128-130
02	06	The activities that are performed in each of the phases of planned change in order to manage the change process (Bullock and Batten)	✔		P124-125
02	07	The key lessons reflected in the Eight Step Model for transforming your organization and the activities described in each step (Kotter) (Note: Cycle of Change, Fig.3.3 on P116 is not examined)	✔		P125-126
02	08	The principles that underpin the congruence model and how each of the four components contributes towards effective management of the transformation process (Nadler and Tushman)	✔		P130-133
02	09	How the characteristics and key elements of each of the three phases of transition can be used to manage this process more effectively (Bridges)	✔		P134-137
02	10	How the challenges of initiating; sustaining; and redesigning and rethinking change address the "forces at play" when managing change (Senge et al)	✔		P140-143

Syllabus Area Code OC		Syllabus Area : Organizational Change	Foundation	Practitioner	Primary Manual Reference
02	11	The organizational change models and approaches associated with each of Morgan's Metaphors and the associated key beliefs and assumptions about change and how change is tackled (Application of 0201 to 0204)		✔	P108-118, Table 3.1 and P145-146
02	12	The strategic change process and how the six essential characteristics can be applied to achieve successful organization-wide strategic change initiatives		✔	P256-260
02	13	When change goes wrong and when change goes right: applying the lessons from approaches used in organizations		✔	Practitioner Handbook Section 3.1
02	14	Different approaches to getting ready for change and how this relates to the successful management of change		✔	Practitioner Handbook Section 3.2
02	15	How the tools that support complex change can be used to engage people interactively in a variety of ways		✔	P405-411
Be able to apply particular models or approaches relating to Organizational Change to a given scenario. **Specifically to identify:**					
03	01	Suitable approaches to organizational change using Morgan's Metaphors and the associated key beliefs and assumptions about change and how change is tackled (as identified in 0201 to 0204)		✔	P108-118, Table 3.1 and P145-146
03	02	Suitable models and approaches (as identified in 0205 to 0210) to manage organizational change appropriately (note: the Carnall change management model, P126-127 is not examined and 'complex responsive processes' (Stacey and Shaw), P132-133 is covered by 0301)		✔	P120-137 and 140-143
03	03	How to apply the strategic change process and an understanding of the essential characteristics of successful change initiatives to enable a change approach to work well (application of 0212)		✔	P256-260
03	04	The factors that other organizations have learned from their successes and failures are an indication of when change is going wrong and when change is going right (application of 0213)		✔	Practitioner Handbook Section 3.1
03	05	Suitable approaches that enable an organization to get ready for managing and implementing successful change (application of 0214)		✔	Practitioner Handbook Section 3.2
03	06	How to apply the tools that support the different approaches to engaging with people when managing complex change (application of 0215)		✔	P405-411
Be able to analyse and distinguish between appropriate and inappropriate use of particular approaches and models relating to Organizational Change within the context of a scenario **Specifically to analyse with reasons whether:**					

Syllabus Area Code OC		Syllabus Area : Organizational Change	Foundation	Practitioner	Primary Manual Reference
04	01	Use of particular principles, approaches and models (as identified in 0301-0306) and their application to achieve successful change is appropriate		✔	P108-137; 140-146 P256-260 Practitioner Handbook Section 3

Syllabus Area Code LC		Syllabus Area : Leading Change	Foundation	Practitioner	Primary Manual Reference
Level	Topic				
Know facts, including concepts, terms, principles, model types, approaches and roles relating to Leading Change. **Specifically to recall:**					
01	01	The leader's role linked to each of the four key organizational metaphors	✔		P152-156
01	02	The description of visionary leadership including: 1. The characteristics of visionary leaders (Bennis) 2. What leaders really do (Kotter)	✔		P156-158 P158-161
01	03	The characteristics of other theories on leadership approaches: 1. Transformational and transactional leadership (Bass; Bryman) 2. Story telling leadership (Gardner) 3. Adaptive leadership (Heifitz and Laurie) 4. Connective leadership (Lipman-Blumen) (Note: Leadership for the 21st century and Table 4.3 are not examined)	✔		P161 P162-163 P163-164 P164-165
01	04	The roles that leaders play: 1. Through the use of dispersed leadership (Senge) 2. Using the four key roles for successful change (O'Neill)	✔		P168-171 P171-174
01	05	The leadership styles and skills (Goleman): 1. Leadership styles that get results 2. Emotional competencies for leaders	✔		P175-178 P177-182
01	06	The different leadership focus for different phases of change: 1. Kotter's recommended actions for the first four change steps in leading change 2. Learning how to persevere (Kanter) 3. Leading people through transition (Bridges) (Note: Inner and outer leadership, Table 4.6, P185-6 not examined at Foundation level)	✔		P187 P188-189 P189-192
01	07	The importance of self-knowledge and inner resources: 1. The role of self-knowledge (Bennis) 2. Characteristics of principle-centred leaders (Covey) 3. Covey's seven habits (Note: Erikson, Table 4.8 is not examined)	✔		P193 P195 P196
Understand the concepts, principles, model types, approaches and roles relating to Leading Change. **Specifically to identify:**					

Syllabus Area Code LC		Syllabus Area : Leading Change	Foundation	Practitioner	Primary Manual Reference
02	01	The leader's role and the type of leadership required linked with each of the four organizational metaphors	✔		P152-156
02	02	The use of visionary leadership including the different focus of leadership and management and how each applies in practice (Bennis; Kotter)	✔		P156-161
02	03	The elements of other leadership approaches: 1. The characteristics of Transformational leadership (Bass; Bryman) 2. The lessons learned about leaders who really make a difference through the use of a central story or message (Gardner) 3. The characteristics of adaptive leadership (Heifitz and Laurie) 4. The characteristics of connective leaders (Lipman-Blumen) (Note: Leadership for the 21st century and Table 4.3 are not examined)	✔		P161 P162-163 P163-164 P164-165
02	04	The characteristics and responsibilities of the roles that leaders play: 1. Dispersed leadership roles and the need for interconnectivity (Senge) 2. The four key leadership roles necessary for successful and sustained change efforts in organizations (O'Neill)	✔		P168-171 P171-174
02	05	The characteristics of leadership styles and skills: 1. The six leadership styles and the situations in which each style is effective (Goleman) 2. The characteristics of each of the four emotional competencies for leaders (Goleman)	✔		P175-178 P177-182
02	06	The different leadership approach and focus needed for different phases of change: 1. Leadership requirements for getting the early steps right (Kotter) 2. The strategies that leaders need to employ to ensure that a change process is sustained beyond the first flourish (Kanter) 3. What leaders need to do to help lead people through transition (Bridges) (Note: Inner and outer leadership, Table 4.6 P185-6, not examined at Foundation level)	✔		P187 P188-189 P189-192
02	07	How self-knowledge and inner resources can be developed to improve the ability of leaders to lead organizational change: 1. Four lessons of self-knowledge (Bennis) 2. The eight characteristics of principle-centred leaders (Covey) 3. The key aspects of the seven habits (Covey) (Note: Erikson, Table 4.8 is not examined in Foundation or Practitioner exams)	✔		P193 P195 P196

Syllabus Area Code LC		Syllabus Area : Leading Change	Foundation	Practitioner	Primary Manual Reference
02	08	Which leadership approaches, roles and styles (as identified in 0203 to 0205, and 0207) should be adopted for leading change situations		✔	P161-165; 168-182 and P193-196
02	09	The approach and focus needed by leaders for different phases of change (applying 0206 and including Table 4.6)		✔	P186-192 including Table 4.6
02	10	The process and activities required to engage stakeholders effectively, including stages of the AIDA(S) framework		✔	Practitioner Handbook Section 4
Be able to apply particular models or approaches relating to Leading Change to a given scenario. **Specifically to identify:**					
03	01	How leaders can overcome the pitfalls linked to the four key organizational metaphors by adopting different types of leadership and leadership approaches (as identified in 0201 to 0203) (Note: Leadership for the 21st century and Table 4.3 are not examined)		✔	P152-165
03	02	How to adopt and apply appropriate leadership roles, styles and skills (as identified in 0204, 0205 and 0207) in different change situations		✔	P168-182 and P193-196
03	03	Appropriate leadership actions for different phases of change (as identified in 0206)		✔	P187-192
03	04	The activities required to engage stakeholders effectively by using the stakeholder engagement process and AIDA(S) framework (as identified in 0210)		✔	Practitioner Handbook Section 4
Be able to analyse and distinguish between appropriate and inappropriate use of particular approaches and models relating to Leading Change within the context of a scenario. **Specifically to analyse with reasons whether:**					
04	01	Use of particular leadership approaches, roles and styles (as identified in 0201 to 0207) in different change situations and phases is appropriate (Note: Leadership for the 21st century and Table 4.3 are not examined)		✔	P152-165 and P168-196
04	02	Use of the stakeholder engagement process and the AIDA(S) framework is appropriate		✔	Practitioner Handbook Section 4

APPENDIX A: Notes on Syllabus and Approved Training Materials

The exam panel has reviewed the textbook "Making Sense Of Change Management" (3rd edition) and as a result has held discussions with Mike Green, one of the authors. There are two minor portions of the text which are agreed to be debatable, ambiguous or potentially misleading as printed, and to which we wish to draw ATOs' attention.

1. Pages 82-85 The Leadership issues in Team Change

This section, together with the corresponding line on Bion (1961) on page 79, table 2.4, implies a sequence of stages or phases. Whilst this is a helpful insight, such a definite sequence is not assumed by Bion (1961) or Turquet (1974). See the authors' note in brackets on page 87.

PRACTICAL CONSEQUENCES

Whilst we shall examine the content of this section of the book, we shall not make any question depend upon the sequence of Bion's or Turquet's 'basic assumptions'.

2. Page 27, Table 1.2 Theory X and Theory Y

In early printings of the third edition of "Making Sense Of Change Management" an error has been made in setting Table 1.2. The last item in the left-hand ("Theory X") column is "People can be creative and innovative". This is actually a Theory Y assumption and should be in the right-hand column. (Later reprints will have this error corrected.)

PRACTICAL CONSEQUENCES

Candidates' attention should be drawn to this error and all training materials checked to ensure it is not propagated. No examination question will depend on this misplaced statement.