



**Randel Consulting Associates**

Leading Organizations through Change and Growth



# Planning the Direction of Change Toolkit

## Preparing to Move Forward

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# Preparing to Move When the Path Isn't Clear

You already know something has to change. You can feel the pressure — in the conversations that keep circling back, in the decisions that keep getting deferred, in the distance between where your organization is and where it needs to be.

## The Paradox of Planning

You don't need to know where you are going to start moving. You need to know where you are - and in which direction you will move.

What's harder is knowing how to begin. Many leaders stall at exactly this moment, waiting for a clear vision to arrive before they allow themselves to plan. And in today's environment — where the ground keeps shifting and certainty is hard to come by — that vision often doesn't arrive on schedule.

This toolkit is built on a different premise. You don't need a complete picture of the destination. You need a shared understanding of where you're starting from, a clear enough sense of direction to take the first steps, and a path you've built together with the people who will walk it alongside you.

That's what the **Planning the Direction of Change Toolkit** helps you do. It's not a substitute for strategic clarity — it's how you build it, step by step, with your team.

*Michael*

Michael Randel

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Helping Leaders and their Teams  
Move Through Change and Growth  
With Calm and Confidence

# Overview: Planning Your Direction of Change

Effective change leaders understand that the process of planning matters as much as the plan itself. Dwight Eisenhower captured this when he observed that plans are useless but planning is essential. He wasn't dismissing preparation — he was pointing to where the real value lies: in bringing people together to surface what matters, build shared understanding, and develop a common sense of direction.

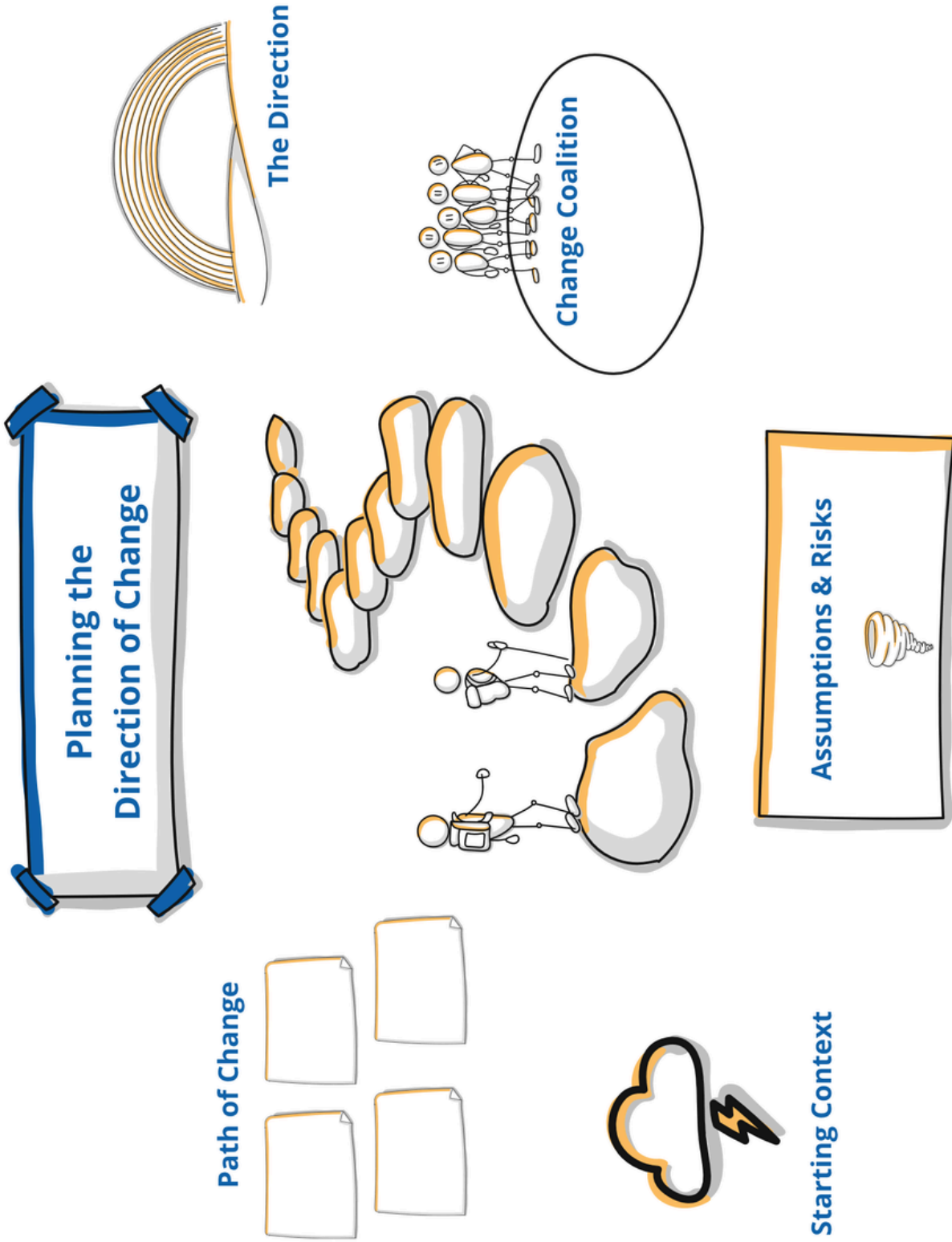
## The Five Components of the Planning the Direction of Change Map

The Planning the Direction of Change tool is organized around five components:

1. **Starting Context:** the shared understanding of where you are beginning from, drawing on what you have already learned about your environment and your stakeholders.
2. **Direction of Change:** a clear enough sense of which way better lies — what you are moving toward and what you are moving away from — without requiring a fully formed vision.
3. **Path of Change:** the major stepping stones that will carry you from today's context toward your direction of change.
4. **Coalition Building:** an ongoing process of identifying and engaging the allies, partners, and sponsors whose support will make the change real. This thread runs throughout.
5. **Assumptions, Risks, and Challenges:** an honest and continuously updated assessment of what you are counting on, what might disrupt the effort, and what would cause you to adapt. This thread runs throughout.

### TIP

Print this template large (poster size) for in-person sessions, or recreate it in a digital whiteboard tool like Miro or Mural for virtual collaboration.



# 1. Starting Context

The Starting Context is the foundation of the entire planning process. Before your team can agree on where you are going, you need a shared and honest picture of where you actually are.

This component is not about generating new analysis. It is about synthesizing the understanding you have already been building — and making sure that understanding is genuinely shared across your leadership team. Two people can look at the same organization and see very different realities. The work of this component is to close that gap.

If you have completed the **Context of Change Map** ([link](#)), bring those insights here — your external and internal environment, your enablers and barriers, the trends and uncertainties you identified. If you have completed a **Stakeholder Assessment** ([link](#)), bring those insights too — who the key players are, where the pockets of support and resistance lie.

## Ways to Gather Information

- **Leadership team discussion:** What is the situation we are responding to? What has changed?
- **Review of Context of Change Map outputs**, if completed
- **Stakeholder Assessment insights**, if completed
- **Recent organizational data:** financial position, program performance, staff capacity
- **Informal conversations:** What is being said in hallways and after meetings?
- **Board and leadership perspectives:** What keeps them up at night?

## Reflection Questions

- What is the situation we are responding to?
- What do we know about our environment — internally and externally?
- Where are the areas of support and resistance among our stakeholders?
- What do different members of our team see that others might be missing?

## 2. Direction of Change

This is the heart of the tool — and the reframe that makes it different from traditional planning approaches.

Rather than asking *What is our vision?*, this component asks something more honest and more actionable: *In which direction should we be moving?* What does better look like from here? What are we moving toward — and equally important, what are we moving away from?

Most leaders can answer this, even when they can't articulate a complete vision. You know the pressures you are responding to. You have a sense of what needs to change. You can describe the direction, even if the destination is not yet clear. That directional clarity is enough to begin.

The goal is not a mission statement or a strategic goal. It is a compass heading — specific enough to guide decisions, honest enough to acknowledge what you are leaving behind, and genuinely shared across your team.

### Ways to Gather Information

- **Individual reflection before group discussion:** ask each person to write their answers before sharing
- **Leadership team dialogue:** Where do we agree? Where do we differ?
- **Stakeholder perspectives:** How do key stakeholders describe what better looks like?
- **Review of strategic documents:** What direction commitments have already been made?
- **Pressure-testing:** Would this direction still hold if our context shifted significantly?

### Reflection Questions

- What does better look like from where we are starting?
- What are we moving toward? What are we moving away from?
- Where does our team agree on the direction? Where do we differ?
- Is our direction specific enough to guide decisions — or is it still too abstract?

# Direction of Change Worksheet

**The Organizational Change We Are Preparing:**



**We Are Moving Toward...**



**We Are Moving Away From...**



**We Will Know We Are Moving In The Right Direction When We Observe...**



## 3. The Path of Change

Once your team has a shared sense of starting context and direction, you can begin mapping the path — the major stepping stones that will carry you from where you are today toward where you are headed.

These are not detailed action plans. They are the significant shifts that need to happen, roughly in sequence, to make the change real. Think of them as the bridge between today's context and tomorrow's direction — substantial enough to orient the work, flexible enough to adapt as conditions evolve.

The critical discipline here is to stay at a strategic level. The pull toward over-planning is strong, especially in uncertain environments where detailed plans feel like a form of control. But in rapidly shifting conditions, plans that are too detailed become outdated quickly — and can create false confidence that the path is more certain than it is.

Aim for a path that is clear enough to guide decisions, but open enough to accommodate what you will learn as you move.

### Ways to Gather Information

- **Leadership team discussion:** What are the 3–5 major moves that need to happen?
- **Sequencing conversation:** What has to happen before what? What can happen in parallel?
- **Stakeholder input:** Who needs to be involved in which steps?
- **Past change analysis:** What has helped previous changes succeed in this organization?
- **Quick wins inventory:** What early steps could build momentum and demonstrate progress?
- **Resource assessment:** What capacity do we have to pursue each step?

### Reflection Questions

- What are the 3–5 major moves that will carry us toward our direction?
- What needs to happen first? What can happen in parallel?
- What does success look like at each major step?
- Where is our path most vulnerable to disruption?

# The Path Of Change Worksheet

Step	What Needs to Happen	Who Needs to Be Involved	What Success Looks Like
1			
2			
3			
4			
5			

## 4. Coalition Building

Change does not happen through individual effort. It happens through the deliberate, sustained work of building the network of allies, partners, and sponsors whose support makes movement possible.

Coalition building is not a discrete step that happens once and is finished. It is a continuous thread that runs throughout the entire planning process — and throughout the change effort itself. At every stage, you are asking: Who else needs to be part of this conversation?

This component draws directly on the stakeholder work you have been doing. Your stakeholder map tells you who holds influence, who is supportive, who may be resistant, and who is undecided. Coalition building takes that intelligence and turns it into deliberate action — identifying who needs to be brought into the planning process itself, who needs to be engaged as the change unfolds, and who might become an unexpected champion if given the opportunity.

The most important distinction to keep in mind: coalition building is a relationship task, not a communication task. Telling people about the change is not the same as bringing them into it. The most powerful coalitions are built through genuine dialogue — through conversations in which stakeholders feel heard and have real influence on how the change unfolds.

### Ways to Gather Information

- **Stakeholder Assessment review:** Who are the key allies and champions?
- **Influence mapping:** Who do others turn to when deciding whether to support a change?
- **Relationship inventory:** Where do we have strong relationships we can build on?
- **Gap analysis:** Whose support do we most need that we don't yet have?
- **Early engagement conversations:** Who could we bring into the planning process itself?

### Reflection Questions

- Who are our natural allies and champions in this change?
- Who holds influence that could accelerate — or block — our path forward?
- Who needs to be part of the planning process, not just informed of the outcome?
- Where do we need to invest in building relationships before we can move?

## Coalition Building Worksheet

Stakeholder/ Group	Their Orientation to Change	Their Sources of Influence	How We Will Engage Them

## 5. Assumptions, Risks, and Challenges

Like coalition building, this component runs throughout the entire planning process. At every stage — as you work through your starting context, your direction, and your path — you are making assumptions. About what is true now. About how stakeholders will respond. About the resources that will be available. About the conditions that will hold.

Naming those assumptions explicitly is not pessimism. It is the kind of honest preparation that keeps your team adaptive when conditions shift — as they will.

The goal of this component is not to predict every risk or produce an exhaustive risk register. It is to build a shared, living awareness of what you are counting on that might not hold, what could disrupt your path, and what would signal that it is time to adapt. That awareness, maintained collectively rather than carried privately by individual leaders, is one of the most important factors in a change effort's resilience.

Three categories worth attending to:

- **Assumptions** — what we are treating as true that we haven't fully tested
- **Risks** — things that could disrupt or slow our progress if they occur
- **Challenges** — conditions we already know are limiting or complicating the work

### Ways to Gather Information

- **Assumption audit:** What are we taking for granted at each stage of the plan?
- **Pre-mortem exercise:** If this change effort fails, what will have caused it?
- **Stakeholder scenario planning:** How might key stakeholders respond in ways we haven't anticipated?
- **Environmental monitoring:** What signals would tell us that our context has shifted significantly?
- **Team candor:** What is each person most worried about that hasn't been said aloud?
- 

### Reflection Questions

- What are we assuming at this stage that might not hold?
- What could disrupt or slow this step in the path?
- What challenges are we already aware of that we need to address?
- What would cause us to revisit our direction or path?

## Assumptions, Risks, and Challenges Worksheet

Category	Description	Likelihood	Our Response
<b>Assumptions</b>			
<b>Risks</b>			
<b>Challenges</b>			

## THE FOUR POWER MOVES

The Planning the Direction of Change Toolkit supports the third of four "Power Moves" that help leaders prepare for change:

1. **MAP** – Create a Context Map to better understand what is contributing to the current situation.
2. **MOBILIZE** – Develop a Stakeholder Assessment to learn about areas of support and resistance. (Who will be affected by the options you're considering? Where will you find allies and resistance?)
3. **MOVE** – Prepare a Plan for the change process—but don't make it too detailed! (What sequence of actions will move you forward? What early steps can you take?) (*You are here — this toolkit supports this move.*)
4. **MESSAGE** – Communicate the Change to prepare your stakeholders for what's coming. (How will you bring people along? What do they need to understand?)

These moves form a natural sequence: understand your context, assess your stakeholders, prepare your approach, and communicate your intentions. Each builds on the one before.

### Where to Go from Here

You've mapped your context, assessed your stakeholders, and planned your direction. The next step is preparing to communicate the change — helping the people around you understand what is happening, why it matters, and what you need from them.

That's what the **MESSAGE** Power Move is about. Look for the next toolkit in this series at my blog.

Visit my blog at [RCACHangeAdvisors.com](https://RCACHangeAdvisors.com) to access the full series of Power Moves toolkits.



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**5 CRITICAL MISTAKES THAT CAN THREATEN YOUR CHANGE INITIATIVE**

Implementing organizational change doesn't have to be challenging. Get our insider tips to overcome these 5 common problems.

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