



CQ Case Study:

A Well-Functioning Research and Consulting Team Tackles Rapidly Increasing Organizational Changes

“The way that a company’s leaders handle change determines if the company will fail or survive or actually come out of the process stronger and more agile than before,” asserts Dr. Barbara Trautlein, principal at Change Catalysts, LLC and designer of the CQ[®] Assessment. “Sooner or later, every company is affected by change in the economy, regulations, technology, products, even personnel. The CQ Assessment helps leaders make the most of change.”

A recent Change Catalysts client is a company that provides online and personalized resources related to employment and recruitment. Their top research and consulting team is made up of experienced project managers, almost all of whom have doctoral degrees. The senior director of the team explains why the CQ Assessment appealed to them. “We go through a lot of change to keep relevant in the marketplace. I wanted to understand how my people manage change and then make sure the change comes across as positive and not a threat. I want to give my team what it needs to work to fullest capacity without being distracted.”

As Trautlein says, “The more leaders know about their own CQs and each other’s, the more empowered they are to lead changes that ‘stick.’ They can apply, combine and adapt their strengths to make sure change happens in the most effective and timely manner, with the greatest return on investment.”


Enabling Positive Change

In just 15 minutes, the CQ Assessment characterizes individual change leaders according to their styles (Coaches, Champions, Visionaries, Drivers, Executors, Facilitators and Adapters) as identified by three main strengths:

- Those who lead from their Heart are engaging and motivating.
- Those who lead from the Head are strategic and inspirational.
- Those who lead with their Hands are tactical and systematic.

A leader’s style may be concentrated in one approach—Heart, Head or Hands—or it might combine strengths. No one style is better or worse, right or wrong, but in different circumstances, different styles may be more effective.

The research and consulting team was especially well-balanced, including a Coach, a Driver, an Executor and an Adapter. “The senior director is a strong Coach,” says Trautlein. “She leads from the Heart. That shows up in her concern to encourage her management team, develop people and reduce stress.”



By contrast, a Driver leads with Head and Hands and is determined to achieve the objectives of a change initiative and move the company forward. He or she is always willing to pitch in and share expertise but may be less concerned with the Heart aspects of change and may at times be less aware of its effect on other people.

On the research and consulting team, the Driver is one of the newer members. “The CQ Assessment was an attention grabber,” he says. “We have a new product being launched and my role has changed over the last few months. The assessment gave me greater awareness of what is going on with the team, what their expectations are and how I might react. I wasn’t aware of my style before or what it means for the changes I’m spearheading.”

He noted that “the CQ Assessment is more behavior based than other assessments.” It helps leaders understand what they focus on, and how they can change their behavior to work with others more effectively.

Handling Change over Time and Across Situations


“Because we each have our own unique blend of Heart, Head, and Hands,” explains Trautlein, “the more team members are aware of their own strengths in leading change, the more effectively and confidently they can modify their behavior to meet the demands of the moment. That’s CQ.”

Change Catalysts has identified three main reasons that organizations find change challenging: the individuals involved may not understand the business case for the change; they may be overwhelmed and distracted by worry about how the change will affect their careers; and they may lack the training or tools to follow through on the change. These situations are often misinterpreted as resistance to change but can be effectively managed by leaders who recognize and anticipate them: leaders who use their CQ to their advantage.

Trautlein says, “Change leaders are able to overcome what looks like resistance but is really either confusion over the goal (no Head), lack of connection to the goal (no Heart) or lack of tactics and training to partner together to work toward the goal (no Hands).”

The Executor in the research and consulting team agrees. “Just knowing where your blind spots and strengths are is important. I’m definitely a task-focused person and I have to make sure that I’m focused on the vision as well. The CQ Assessment made me aware that I have blind spots so that I can begin to address them. It made sense.”

Understanding the Language of Change



While this particular team is well balanced, that balance also means that each leader manages change in a different way. One value of the CQ Assessment, Trautlein says, is that it gives leaders a common language for communicating with each other about their individual roles, strengths and expectations.

For one of the team's project managers, the CQ Assessment led to a personal reassessment. She explains, "I'm an Adapter, with strengths in all three areas, and I do actually deal well with change and ambiguity in a lot of situations. The information from the CQ Assessment will enable me to be more customized in the way I manage people. The assessment also said I excel at innovation. I wouldn't have considered that one of my strengths. I realized I may be the one stopping myself from being innovative. The assessment really made me aware of my abilities to lead change."

Change Intelligence: What It Means for You

Research has shown that over 70 percent of change efforts fall short of expectations. Change places tremendous stress on organizations and those expected to lead and carry it out.

The CQ Assessment is grounded in psychology and neuroscience, real life experience managing complex transformations and extensive testing in the field. "At Change Catalysts, we offer clients our proprietary CQ System for leading change," says Trautlein. "We help organizations deal with all types of change, whether the drivers are internal or external. Change is most successful when leaders recognize their leadership strengths and how they can best apply them. The CQ Assessment is the first step in knowing."