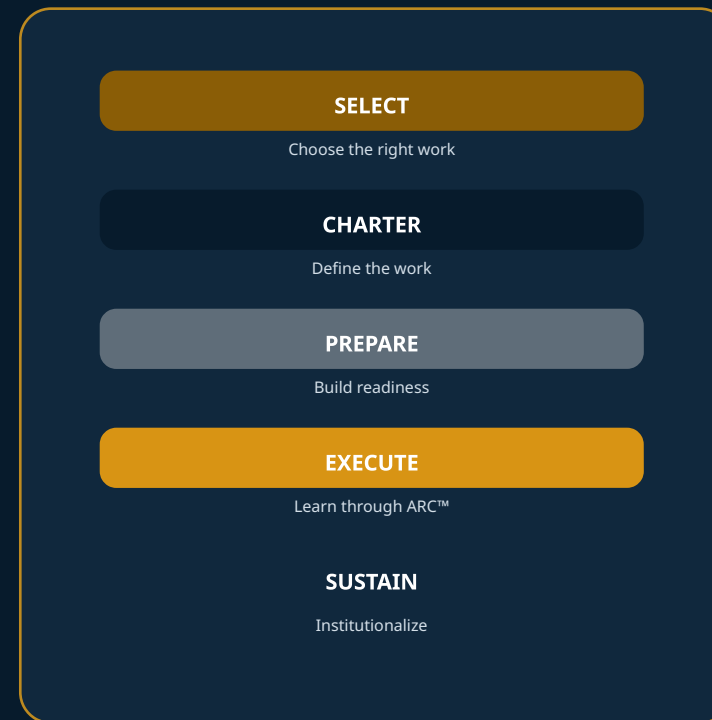


CHANGE & TRANSFORM™

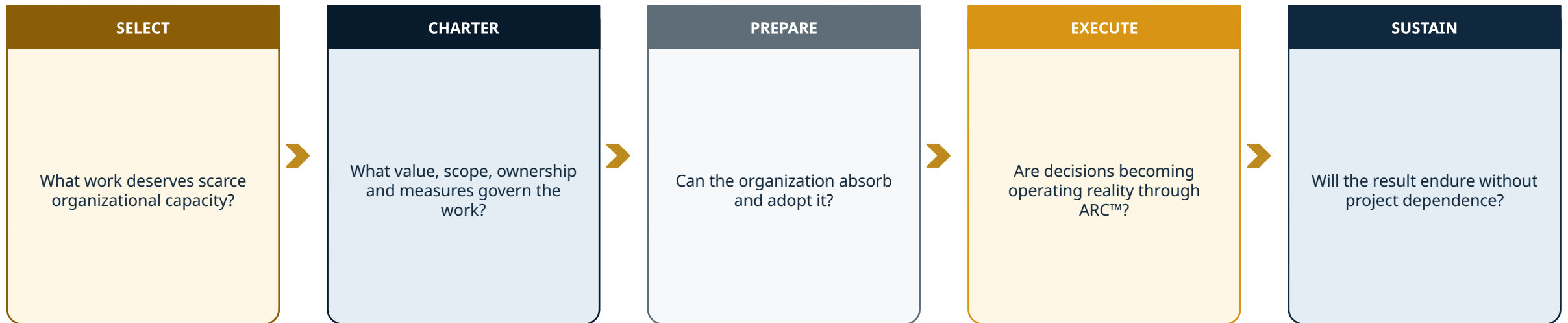
From selected work to sustained operating reality.

A disciplined value stream for selecting, chartering, preparing, executing
and sustaining change at any scale.



The executive premise

Transformation succeeds when leaders govern five decisions as one integrated operating system.

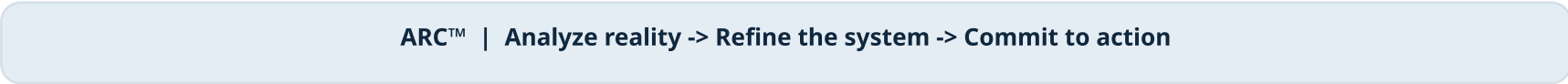
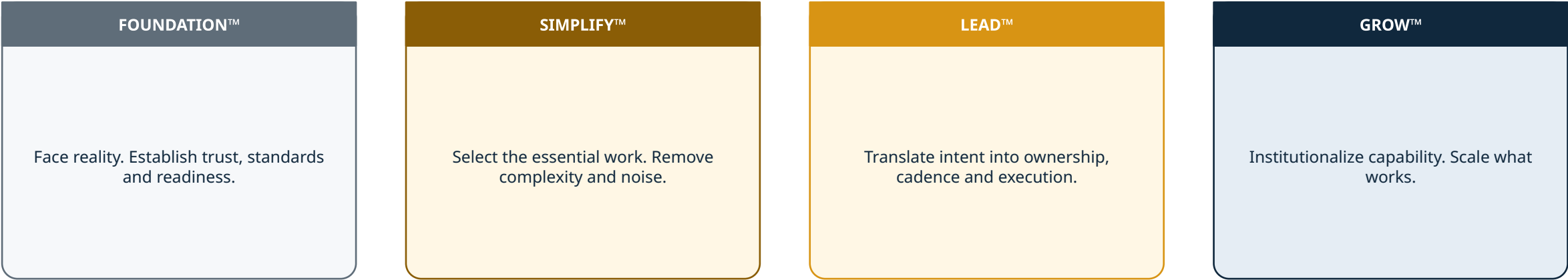


The guide teaches the deck through this spine: Select -> Charter -> Prepare -> Execute -> Sustain.

Board-level standard: keep the focus on decisions, ownership and evidence - not on the mechanics of each template.

The Compass Operating System provides the architecture

Change & Transform™ is the horizontal value stream. ARC™ is the improvement engine. The four pillars are the operating disciplines.



Do not introduce Change & Transform™ as a sixth pillar. It is the value stream that uses the Compass Operating System.

Select the right work before executing the work right

FOUNDATION™ reveals present reality. SIMPLIFY™ determines which work deserves scarce organizational capacity.

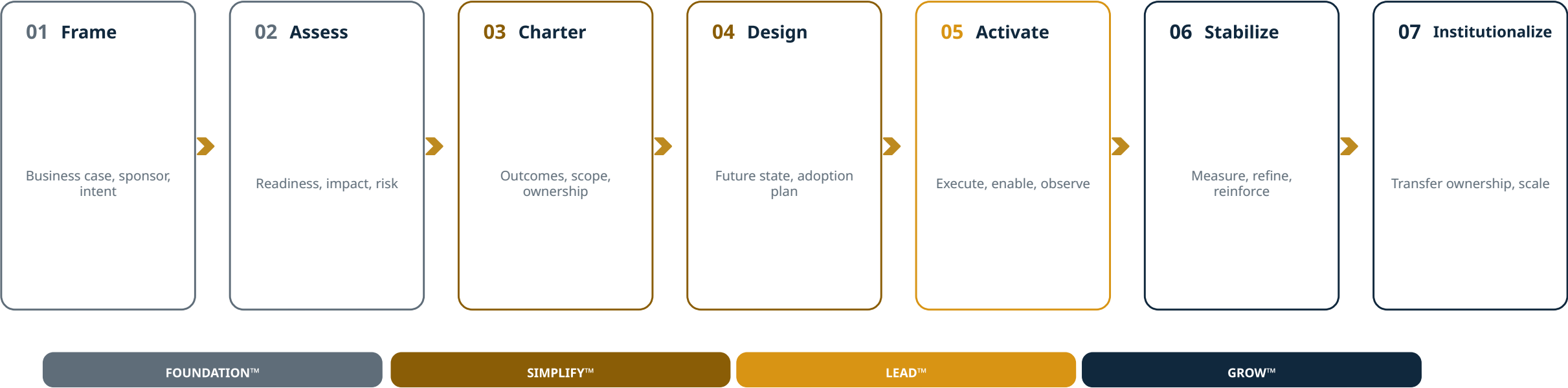


Entry Gate: Initiative Intake & Prioritization determines whether the work should be chartered.

Compass principle: not every problem deserves a project. Some work should be stopped, simplified, delegated or standardized.

The Change & Transform™ value stream

Seven stages create one repeatable path from strategic intent to institutionalized capability.



The method remains consistent. Scope, governance and the number of ARC cycles expand.

The value stream is the transformation flow; the pillars and ARC provide the discipline underneath it.

One method, four scales of work

The same operating logic applies from a focused improvement to an enterprise transformation.



Transformation is improvement at enterprise scale. The discipline remains consistent.

Eight Compass Working Instruments™ used in one sequence

After the selection gate, each instrument produces an output required by the next decision.



Entry Gate: Select -> then use the eight instruments as a connected management sequence.

The instruments are not independent templates. They create management rigor without bureaucracy.

The working sequence aligns to five executive gates

Executives govern decisions. Practitioners use the instruments to create the evidence and outputs for those decisions.



Each gate requires an explicit decision before the organization commits more capacity.

Working Instrument 01 - Compass Transformation Charter™

The charter is the control document linking selected work to strategy, governance, adoption and ARC.

CHARTER CORE

Present Reality
Strategic Intent
Future State
Essential Outcomes
Scope + Boundaries
Sponsor + Owner
Decision Rights
Measures + Risks
Initial ARC Question

PURPOSE

Defines what is changing, why it matters and what outcome must hold.

SIPOC - WHEN NEEDED

Use when suppliers, inputs, process boundaries, outputs or customers are unclear.

TRIGGER

Approval launches the first ARC event and establishes the governance cadence.

SIPOC is optional: use it to resolve boundary ambiguity, not as a documentation exercise.

Prepare the organization before accelerating execution

Readiness and adoption are designed into the work - not added after the project plan is complete.

02 - CHANGE READINESS DIAGNOSTIC™

Leadership alignment
Case for change
Capacity and competing priorities
Process and technology readiness
Manager preparedness
Reinforcement infrastructure

Output: readiness heat map and risk priorities

03 - STAKEHOLDER + ADKAR® MAP

Who is affected
What changes for them
Influence and current support
Likely concerns and barriers
Awareness, Desire, Knowledge, Ability, Reinforcement

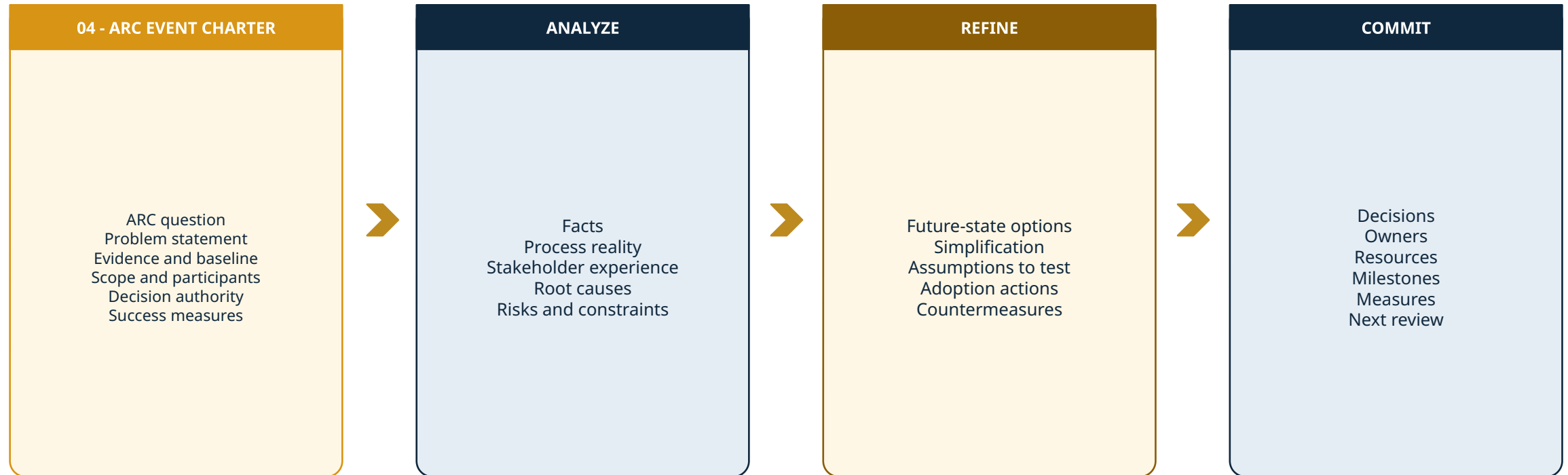
Output: prioritized engagement and adoption plan

Resistance is treated as operating data - a signal of what the system still needs.

ADKAR® is a registered trademark of Prosci, Inc.; referenced as an attributed adoption model.

Execute through ARC™ - charter, learn, decide

ARC converts operating evidence into decisions and action. Gemba keeps the cycle connected to reality.



Gemba observation feeds the next ARC cycle with evidence from where the work actually happens.

Measure adoption and performance side by side

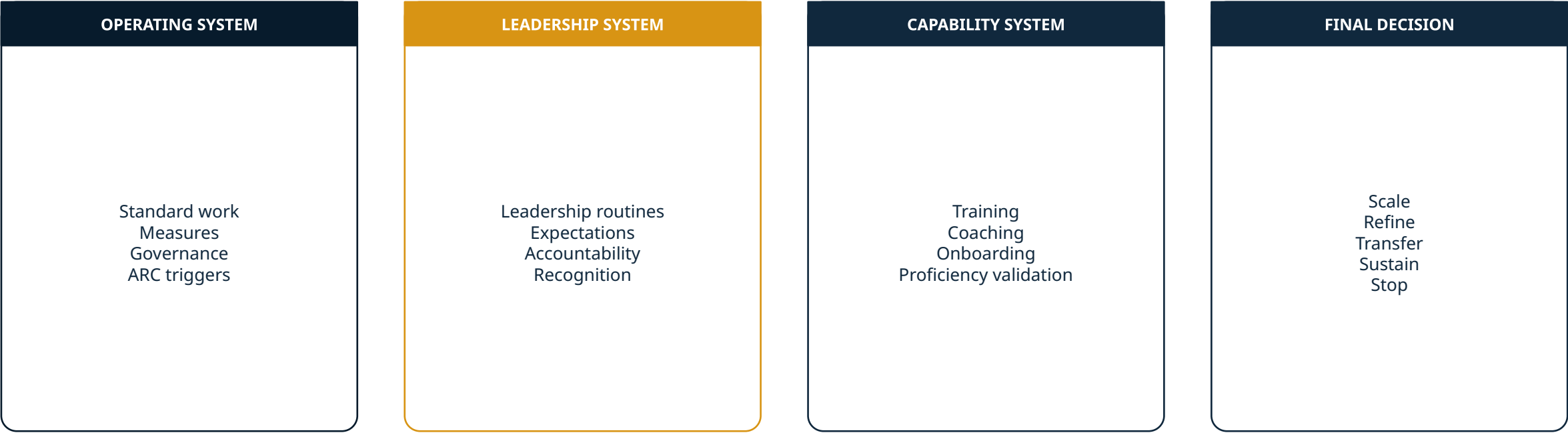
Technical completion is not transformation. The scorecard shows whether the new way is used and whether it creates value.



The board sees one truth: adoption, execution and value realization - not separate status reports.

Institutionalization is the final design decision

The work is complete only when ownership, capability and governance move into the operating system.



Project closure is an administrative event. Institutionalization is an operating-system outcome.

Governance: the decisions leaders must own

Compass governance keeps accountability with leaders while the instruments create visibility and discipline.



The advisor may architect the system. Leaders must own the decisions, behaviors and results.

THE COMPASS STANDARD

Change must become operating reality.

Select the right work. Charter it with discipline. Prepare the organization. Execute through ARC™. Institutionalize what works.

Simple enough to understand. Rigorous enough to govern transformation at scale.

FOUNDATION™

SIMPLIFY™

LEAD™

ARC™

GROW™