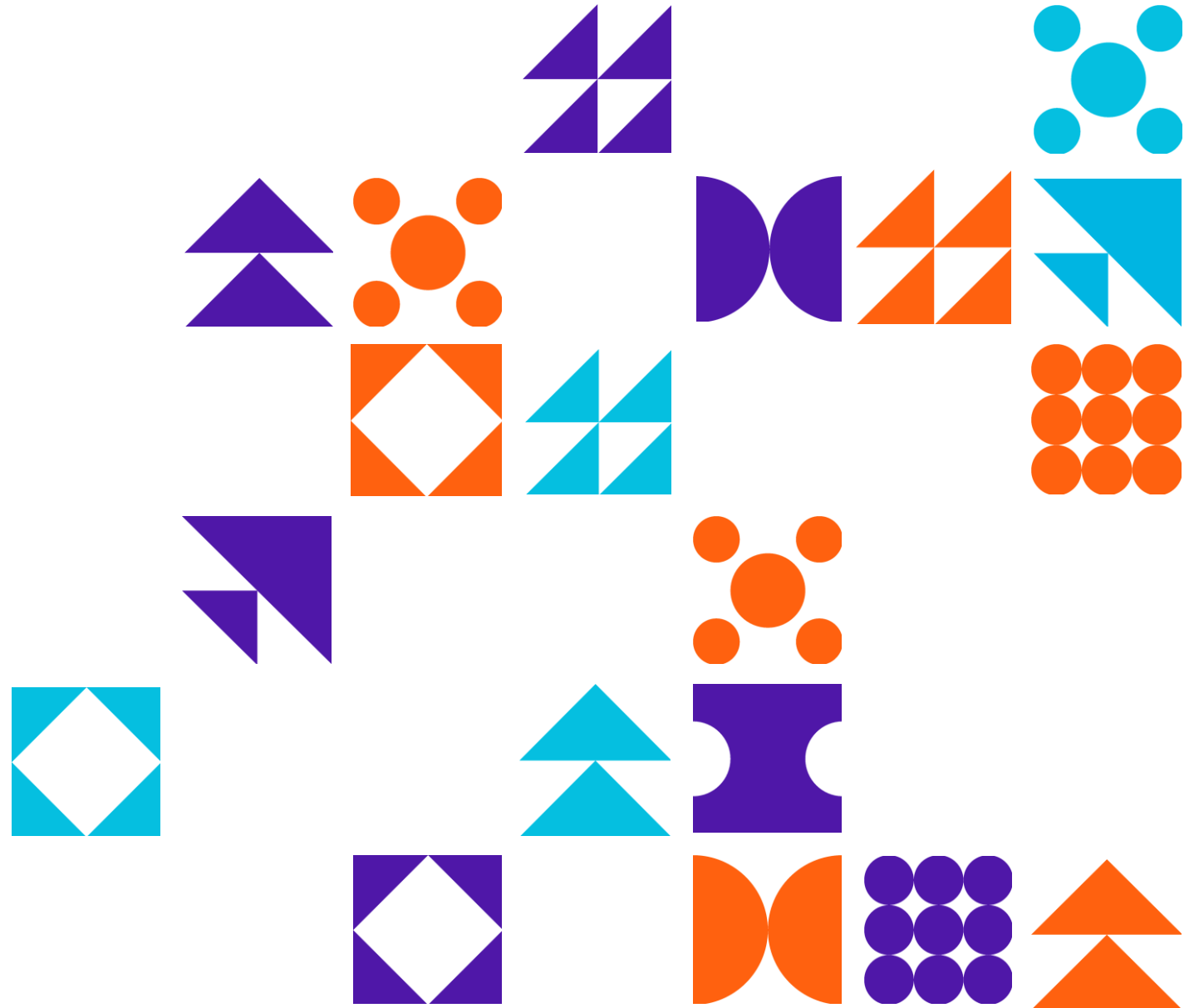


# BUILDING TRUST & MANAGING CHANGE

Victoria Perry

PDD 2024 | PMI-OC

02 24 2024



# Building Trust and Managing Change

## Learning Objectives



Trust is foundational to a healthy team, and building it requires authenticity, logic, and empathy.



Invest in getting to know your team members and advocating for their wellbeing.



Inclusive leadership requires intentionality and building processes to ensure equity.



Inspire and empower your team to embrace a continuous improvement mindset.



Change Management messaging must appeal to the head and the heart.

# Tell me about yourself...

## Manage a Project or Portfolio

Lead the project team and is responsible for achieving project outcomes and delivering value to the organization

1

## Manage People

Hire, lead, and develop team members to optimize their talent and maximize their productivity in support of the organization's overall mission

2

## Aspiring

For broader influence and impact?

3

# Project Management and People Management

## Fungibility of Your Project Management Skills

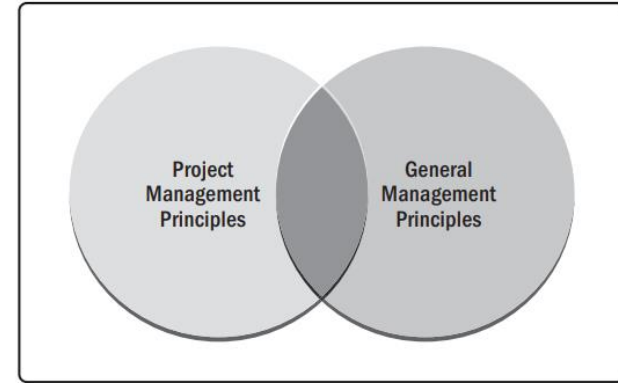


Figure 3-1. Overlap of Project Management and General Management Principles

Principles of Project Management			
Be a diligent, respectful, and caring steward	Create a collaborative team environment	Effectively engage with stakeholders	Focus on value
Recognize, evaluate, and respond to system interactions	Demonstrate leadership behaviors	Tailor based on context	Build quality into processes and deliverables
Navigate complexity	Optimize risk responses	Embrace adaptability and resiliency	Enable change to achieve the envisioned future state

Figure 1-1. Relationship between Project Management Principles and Project Performance Domains



An aerial photograph of a rocky coastline. The rocks are dark and jagged, forming a complex pattern. Several tide pools of varying sizes are scattered across the rocks, reflecting the sky. The water in the pools is a mix of light blue and grey, suggesting a slightly overcast sky. The overall scene is rugged and natural.

## Let me tell you a story...

- I was at a crossroads in my career
- I heard of an operational team in need of a manager
- It wasn't an ordinary team...  
Let's say it had been *stormy* in recent years for the team

“You cannot swim for  
new horizons until you  
have the courage to  
lose sight of the shore.”

- William Faulkner







# Building Trust

# Building Trust and Managing Change

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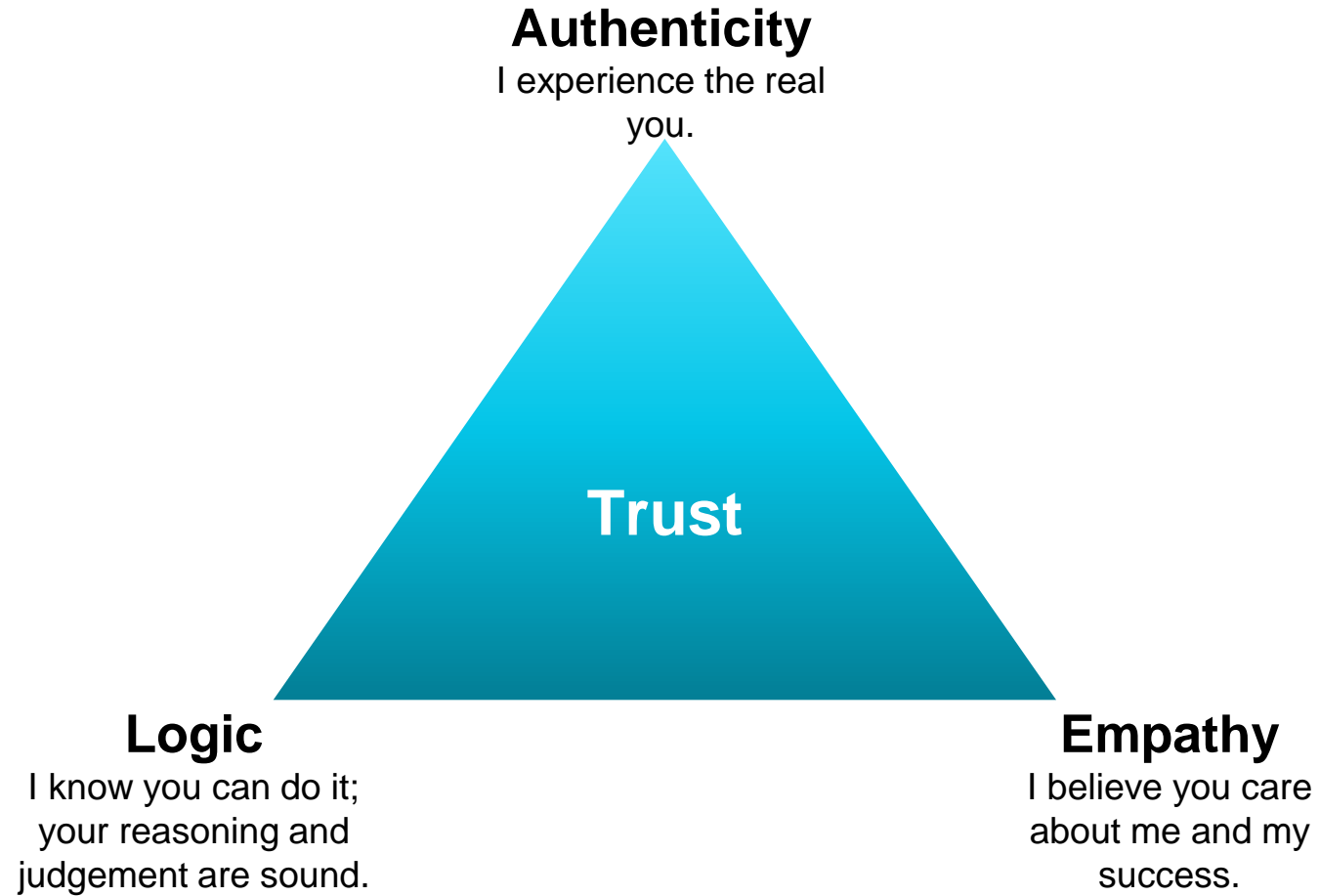
# Why is Trust Foundational?

## The Five Dysfunctions of a Team



# How is Trust Built?

## 3 Drivers of Trust



# Gauge Associate Sentiment

## Associate Engagement Tool



How  
satisfied  
are you  
with your  
company  
as a  
place to  
work?

I know what is expected of me at work.

I have the materials and equipment I need to do my work right.

At work, I have the opportunity to do what I do best every day.

In the last seven days, I have received recognition or praise for doing good work.

My supervisor, or someone at work, seems to care about me as a person.

There is someone at work who encourages my development.

At work, my opinions seem to count.

The mission or purpose of my company makes me feel my job is important.

My associates or fellow employees are committed to doing quality work.

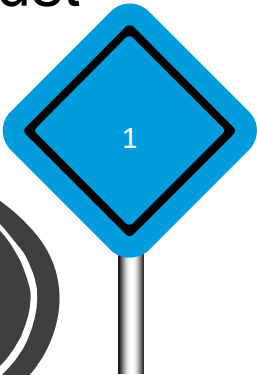
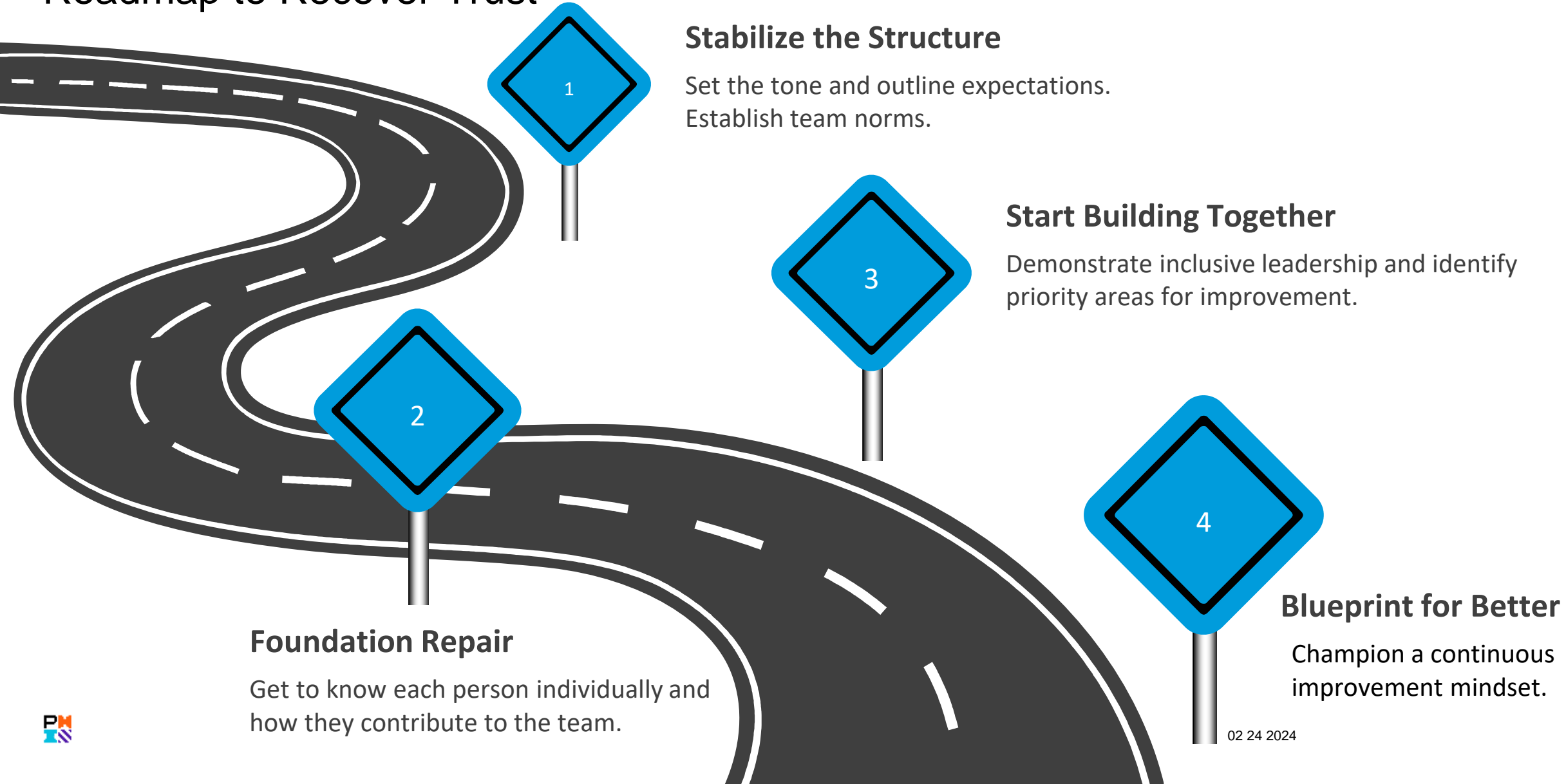
I have a best friend at work.

In the last six months, someone at work has talked to me about my progress.

This last year, I have had opportunities at work to learn and grow.

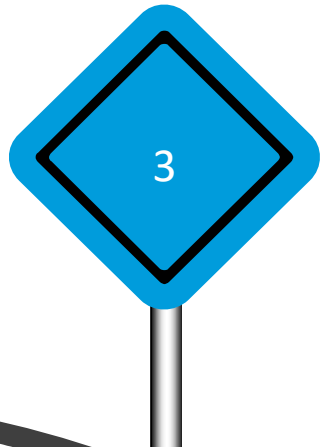
# Team Transformation

## Roadmap to Recover Trust



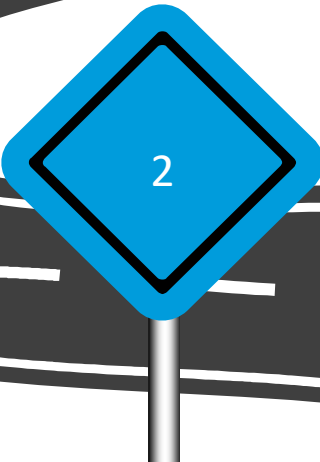
### **Stabilize the Structure**

Set the tone and outline expectations.  
Establish team norms.



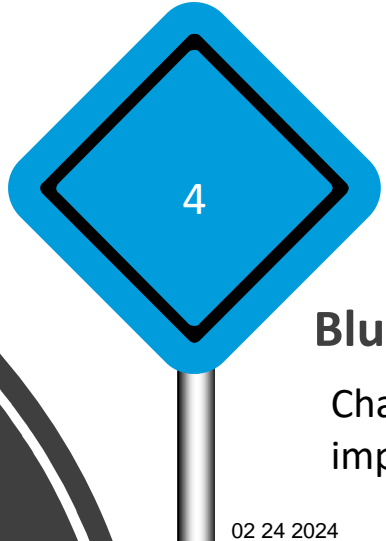
### **Start Building Together**

Demonstrate inclusive leadership and identify  
priority areas for improvement.



### **Foundation Repair**

Get to know each person individually and  
how they contribute to the team.



### **Blueprint for Better**

Champion a continuous  
improvement mindset.



# Set the Tone

## Manager Commitments Tool



As a manager I will...

be honest,  
authentic and  
available

get to know you as  
an individual

listen to and  
consider your  
perspectives

be open in sharing  
ideas, information  
and opinions

prepare for and  
hold regular 1:1s

provide clear  
expectations, along  
with timely and  
specific feedback

support you in  
achieving individual  
and team  
objectives

support your  
development and  
discuss your career  
aspirations

recognize your  
accomplishments

be knowledgeable  
about your work

develop myself as  
a leader

?



# Clarify Team Norms

## Team Agreements Tool



### Relationships

We assume positive intent. We provide candid and constructive feedback to each other.



### Communication

We present problems in a way that promotes mutual discussion and resolution. We share all information we have up front.



### Meetings

We respect each others' time. We ensure our meetings are effective by establishing an agenda in advance. We rotate roles.



### Conflict

We debate ideas and avoid personal attacks. We ensure we are aligned internally before engaging outside teams.



### Projects

We are one team, and we all own the outcome. We strive to continuously improve.

# Building Trust and Managing Change

## Learning Objectives



Trust is foundational to a healthy team, and building it requires authenticity, logic, and empathy.



Invest in getting to know your team members and advocating for their wellbeing.



Inclusive leadership requires intentionality and building processes to ensure equity.



Inspire and empower your team to embrace a continuous improvement mindset.



Change Management messaging must appeal to the head and the heart.

# Know Your Team Members

## Career Profile Tool



**ROLE** AVP, IO  
Manager  
**TENURE** 9 years  
**EDUCATION** MBA, PMP  
**STATUS** Married with 2  
kids (5 and 1)

**Victoria Perry**



*"I am a passionate advocate for associate engagement and delivering solutions that meet the true business need."*

### STRENGTHS

Talent Development    Cultural Contributor  
Project Management    Business Analysis  
Product Ownership    Continuous Improvement

### DEVELOPMENT AREAS

Deepen domain knowledge    Influence without authority

### ASPIRATIONS

Desires to be a Senior Manager: developing managers and effective teams as well as designing and leading strategic change

### BIO

Victoria has been at Capital Group for nearly 9 years. She started as a business analyst and developed her project and people leadership skills. She is not scared of a challenge. She thrives on transformational work, envisioning the future and leading teams through change. She invests in her team and mentees, delighting to see them develop new skills and reach their career goals.

### ANNUAL GOALS

1. Develop Future Team Leads
2. SIMPL Project Leadership
3. IO Campus Redesign

### MOTIVATORS

Intellectual curiosity  
Having a long-term impact  
Creating a sense of community  
Becoming a better leader

### NETWORK

**Key Stakeholders:** WTS, HRA, BLLS, ERIS, ARNB

**Mentors:** WIAC, ROBL, BEP

**Mentees:** Ref Data, ECHs, ...

**Communities:** Capital Women, Working Parents, Veterans

# Team Building



# Building Trust and Managing Change

## Learning Objectives



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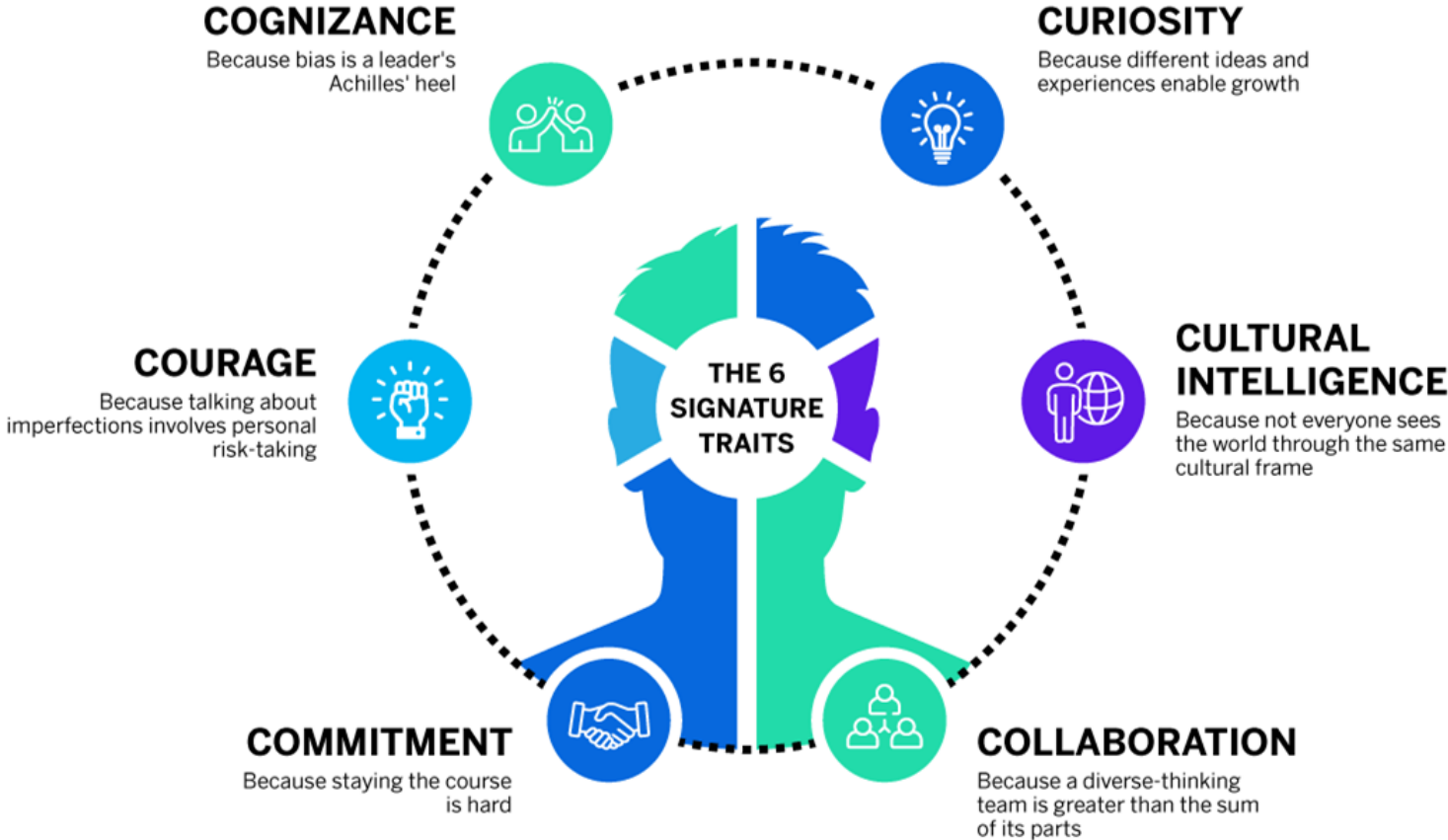


Change Management messaging must appeal to the head and the heart.



# Inclusive Leadership

## 6 Signature Traits of an Inclusive Leader



# Inclusive Leadership

## Inclusive Leadership Evaluation Tool



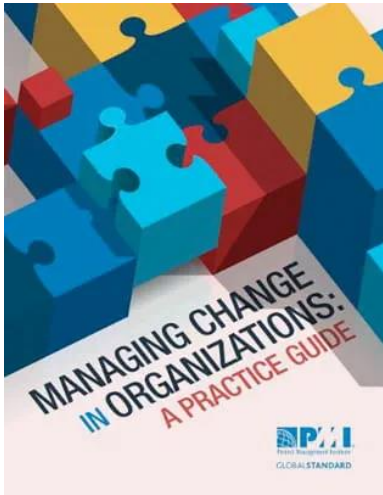
DEVELOPING AWARENESS	EMBRACING INCLUSIVE PRACTICES	CREATING AN INCLUSIVE CULTURE
I tend to gravitate to the same people for projects.	I reach out to people I haven't worked with when kicking off new projects.	I prompt other leaders to consider different sources of talent for their projects.
I often move ahead and make decisions with input from my short list.	I make a point of connecting with several members of my team before making key decisions.	I invite input from a varied set of people on important decisions, including some I expect will have a different point of view.
I tend to keep my work life and personal life separate.	I share stories from my life outside the office with my colleagues.	I listen carefully and am respectfully curious when people share their own stories.
I shield my team from issues and mistakes.	I am transparent about problems and admit when something goes wrong.	I encourage my teams to take risks and support them through failures.
I get uncomfortable when someone says something marginalizing.	I model inclusivity in my words and actions.	I speak up to correct exclusionary language and behaviors.



# Managing Change

# Managing Change

## What is Change Management?

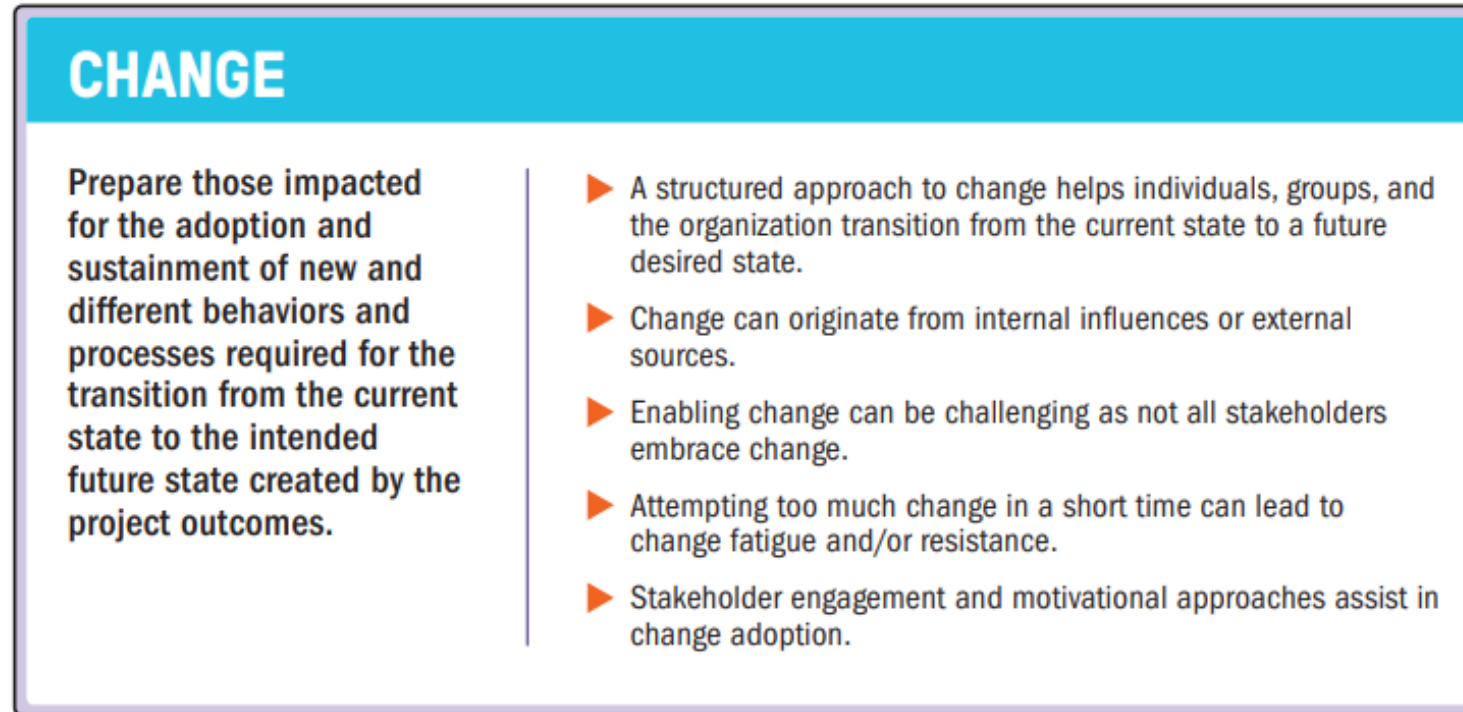


**Change Management:** a comprehensive, cyclic, and structured approach for transitioning individuals, groups, and organizations from a current state to a future state with intended business benefits. It helps organizations to integrate and align people, processes, structures, culture, and strategy.



# Managing Change

## What is the Project Manager's Responsibility?



**Figure 3-13. Enable Change to Achieve the Envisioned Future State**



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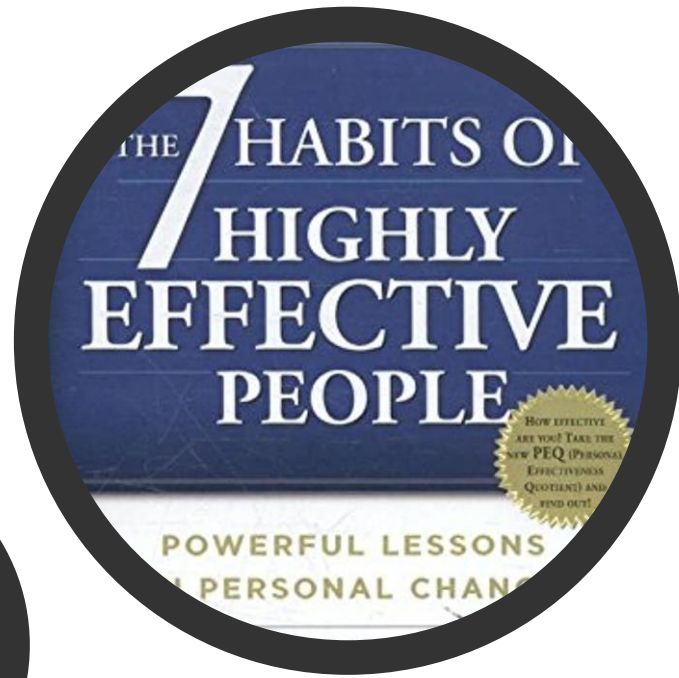
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**STRENGTHSFINDER 2.0**

**FROM GALLUP**

*and Tom Rath*

**Discover Your  
CliftonStrengths**

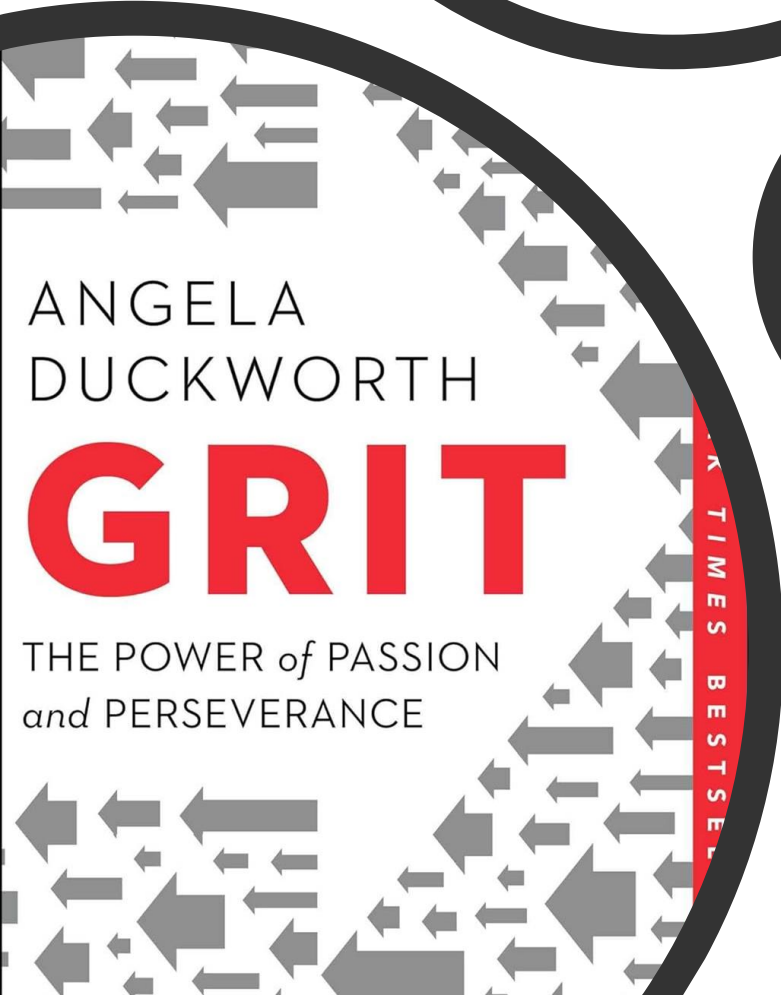
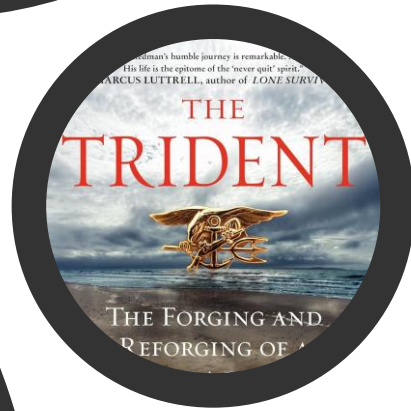


The *New York Times* bestseller, now in paperback and updated with a new preface

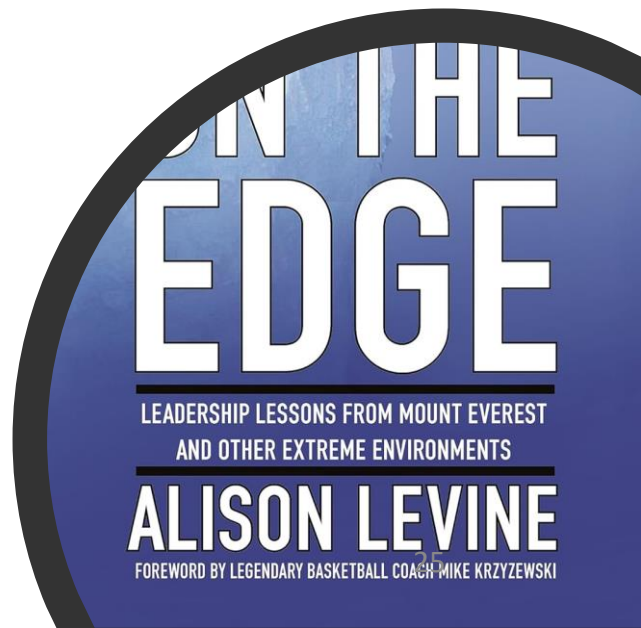
**THE  
CONFIDENCE**



...CE AND ART OF  
...WHAT

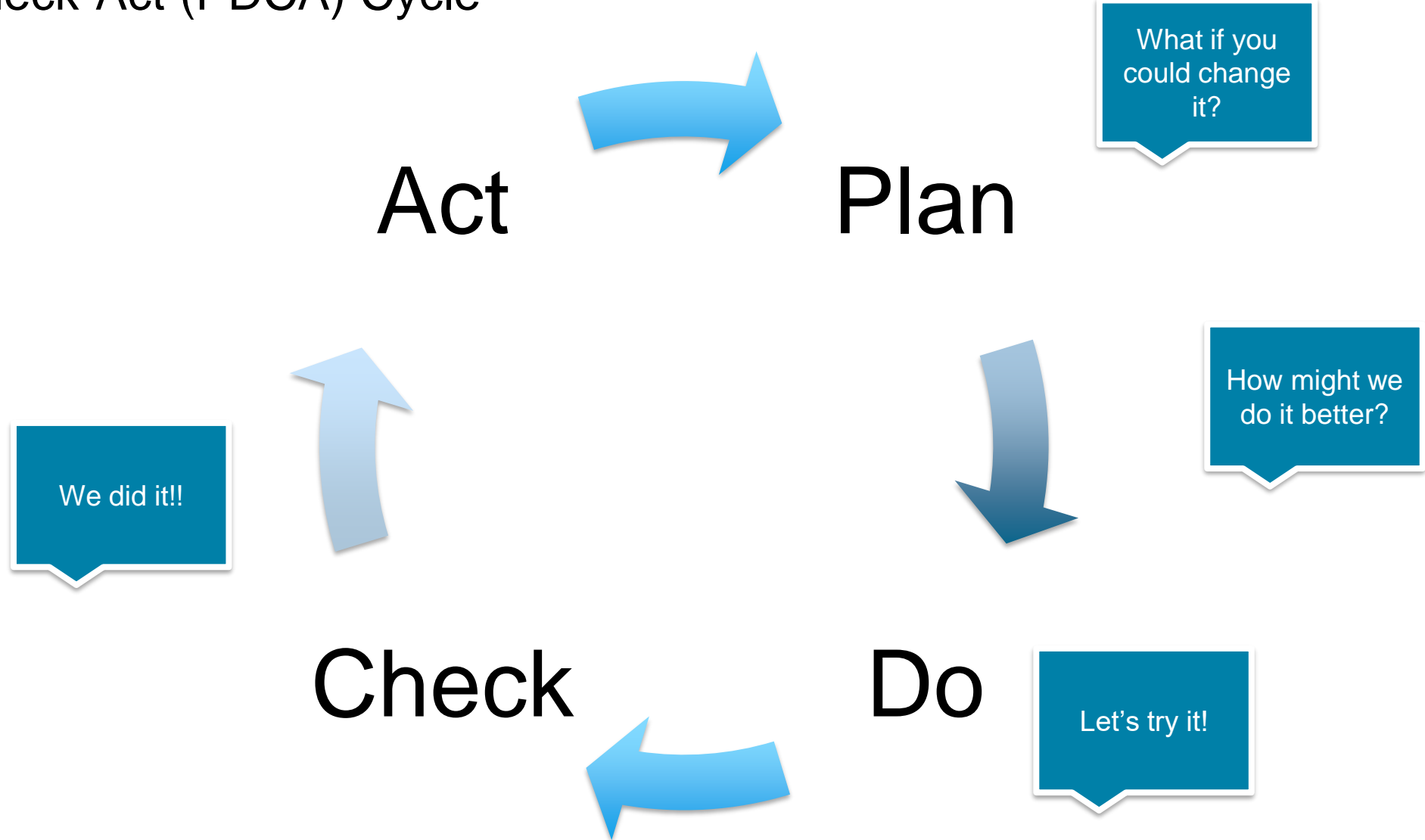


# Inspiring Content



# Continuous Improvement Mindset

## Plan-Do-Check-Act (PDCA) Cycle



# Continuous Improvement Mindset

## Pain Point Analysis Tool



### Discussion Prompts

- What feels like a waste of time?
- What frustrates you about your work?
- What do you wish you could delegate to someone else?
- What causes errors to occur?
- What do customers or stakeholders complain about the most?
- What takes longer than it should?
- What seems to be unnecessarily complicated?
- What causes delays?
- When do you reach out for more information before you can complete your task?
- What ad hoc activities do you perform?
- What are the most common inquiries you need to address?

# Leading Change

## ADKAR Model: 5 Stages of Change



### **AWARENESS**

Leaders can raise awareness by communicating the reasons behind the change and its expected benefits.



### **DESIRE**

Leaders can build desire by addressing concerns/resistance, and highlighting how the change aligns with the organization



### **KNOWLEDGE**

Leaders can provide training and resources to help individuals build their knowledge and capabilities.



### **ABILITY**

Leaders can provide ongoing coaching and support to help individuals build their confidence and competence.



### **REINFORCEMENT**

Leaders can reinforce the change by celebrating successes, recognizing employees who have adopted the change.



# Leading Change

## Kotter's 8-Step Process



# Building Trust and Managing Change

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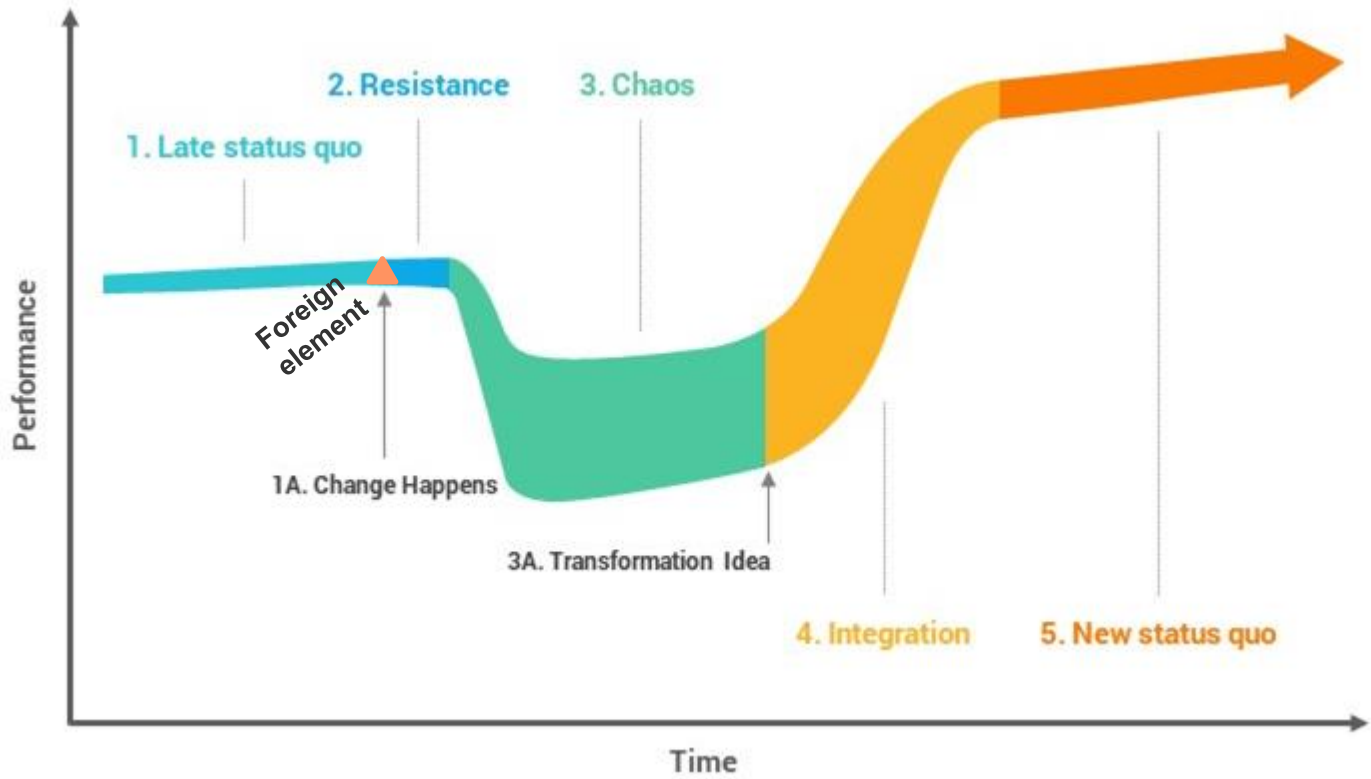
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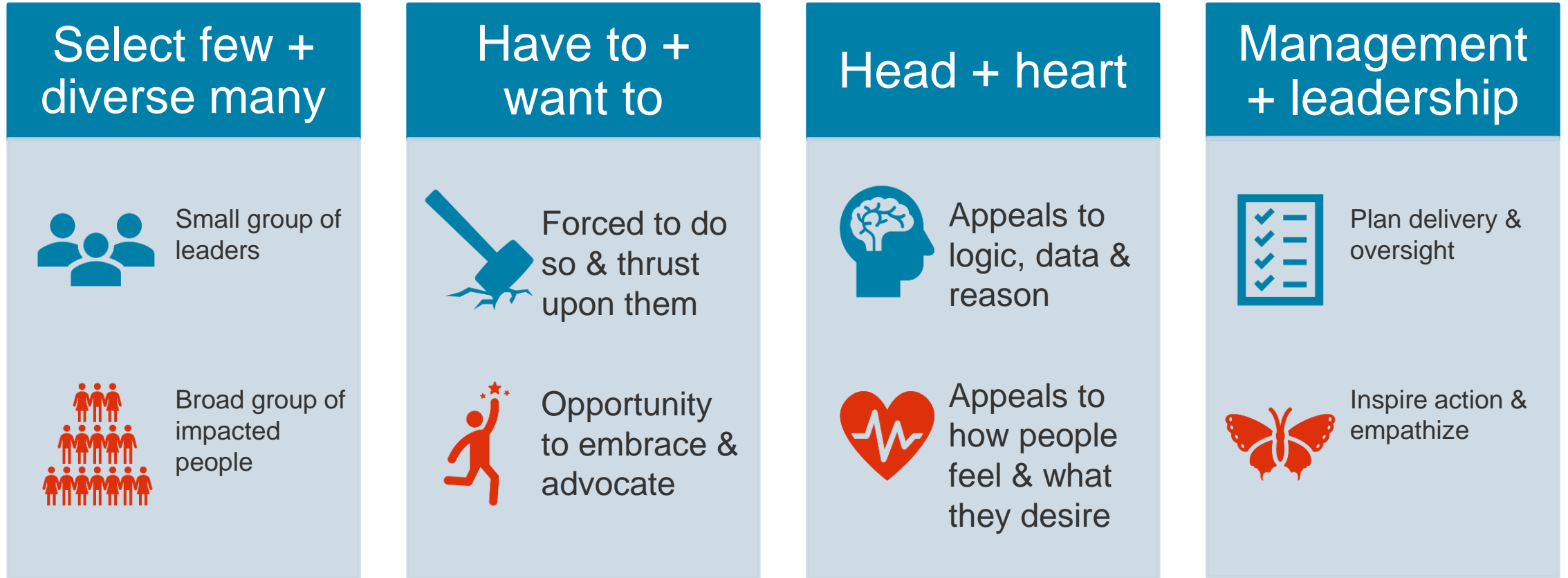
# Leading Change

## Satir's Change Model



# Leading Change

## Kotter's 4 Change Principles



# Building Trust and Managing Change

## Models and Processes Referenced

- Five Dysfunctions of a Team (Patrick Lencioni)
- Trust Triangle (Frances Frei and Anne Morriss)
- 6 Signature Traits of an Inclusive Leader (Deloitte)
- Change Management Process (PMI)
- Plan-Do-Check-Act (PDCA) Cycle (Shewhart / Deming)
- ADKAR Model: 5 Stages of Change (Jeffrey Hiatt)
- 8-Step Process for Leading Change (John Kotter)
- Change Model (Virginia Satir)
- 4 Principles of Change Management (John Kotter)

# Building Trust and Managing Change

## Tools Inventory



- Manager Commitments Tool
- Team Agreements Tool
- Career Profile Tool
- Associate Engagement Tool (Gallup)
- Inclusive Leadership Evaluation Tool (HBR)
- Pain Point Analysis Tool



# Building Trust and Managing Change

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# Let's Connect!



## **Victoria Perry**

**AVP, Manager**  
**Investment Operations**



Connect with me on LinkedIn:  
<https://www.linkedin.com/in/victoriaperrymba/>

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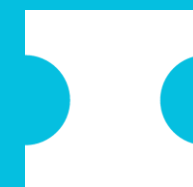
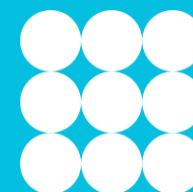
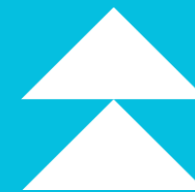
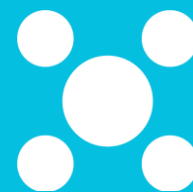
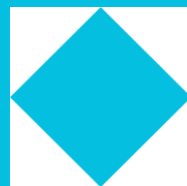


THANK YOU

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AVP, Investment Operations Manager

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