

CHANGE THAT STAYS · CHAPTER SEVEN

The Field Manual

Fourteen working pages, the agreements, the walk sheet, the run sheets and the reviews, ready to carry into a room.

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Santa Anna, A. (2026). The Field Manual. In Change That Stays (ch. 7). Luminous Prosperity Inc. https://doi.org/10.5281/zenodo.23989564
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Published by Luminous Prosperity Inc. for Haute Lumière. Author ORCID 0009-0008-3244-0306.

DOI 10.5281/zenodo.23989564 · this record's page: business.hautelumiere.life/library/change-that-stays/07-the-field-manual/

Please cite as: Santa Anna, A. (2026). The Field Manual. In Change That Stays (ch. 7). Luminous Prosperity Inc. https://doi.org/10.5281/zenodo.23989564

Chapter Seven of Change That Stays. The whole book, with every chapter, is at business.hautelumiere.life/library/change-that-stays (DOI https://doi.org/10.5281/zenodo.23989557).

A NOTE BEFORE YOU READ

This work is offered for education and leadership development. It is not legal, financial, accounting, investment, medical or psychological advice; take the advice of a qualified professional who knows your circumstances. Companies and events are described from the public record as the author understands it; characterisations are the author's analysis. Examples are illustrative, and no particular outcome is promised to any reader.

ABSTRACT

Fourteen working pages, the agreements, the walk sheet, the run sheets and the reviews, ready to carry into a room. The chapters of this book describe five practices as people doing them. This chapter holds the working pages: the agreements, run sheets, question sets and one-page records that the earlier chapters point to and do not print. Each page is meant to be photocopied, filled in by hand, and kept in a folder that the convenor of Chapter 6 looks after. Nothing here needs software. The pages follow the order of the ninety days after done, not the order of the chapters. Each opens with a line saying where it comes from and when it is used. Where a page gives a script, the words are a starting point; say them in your own voice. Where it gives a time, the time is a planning guide from practice, not a finding.

CHAPTER SEVEN

The Field Manual

Fourteen working pages, the agreements, the walk sheet, the run sheets and the reviews, ready to carry into a room.



The Field Manual

HAUTE LUMIÈRE · CHANGE THAT STAYS · CHAPTER SEVEN

How to use these pages

The chapters of this book describe five practices as people doing them.[38] This chapter holds the working pages: the agreements, run sheets, question sets and one-page records that the earlier chapters point to and do not print. Each page is meant to be photocopied, filled in by hand, and kept in a folder that the convenor of Chapter 6 looks after. Nothing here needs software.

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point; say them in your own voice. Where it gives a time, the time is a planning guide from practice, not a finding.

Two rules govern the whole manual. Read the work as it is performed, not as it is described. And answer everything you collect: an objection heard and not answered, a cut recorded and not restored, a drift seen and not discussed, teaches the opposite of what the practice is for.

What these pages do not contain is the design of any arrangement for sharing a gain: proportions, thresholds, timing or terms. Those belong to each organisation and the people it covers, and they are decided separately.

1 · The record of changes

From Chapter 1. Used in days one to ten, and kept afterwards as the organisation's own history of change.

List the last three improvements made to work of the same kind as this one.

CHANGE	WHEN INTRODUCED	WHAT IT WAS MEANT TO DO	WHAT IT IS DOING NOW	WHEN ANYONE LAST LOOKED	WHAT UNDID IT, IF ANYTHING

Reading it. Look down the last column. The force that undid an earlier change is the one most likely to undo this one. Write it at the top of page 2.

2 · The holding agreement

From Chapter 1. Agreed and signed between days eleven and thirty, before the first monthly figure is read.

The change, in plain words
What *done* means (the condition for closing, not the target)
The keeper (runs the work; was not on the programme team)
Result measure, and the record it comes from
History used, and the ordinary range it shows
Practice measure (the thing that produced the result), and how it is counted
The pressures the change has not yet met (season, peak, holiday, year-end)
Holding period (until each pressure has been met once)
Drift rule (agreed now, applied the same way to good and bad news)
The force most likely to undo it (from page 1)

Date agreed	
Signed	

An example drift rule, to be adapted: one monthly point outside the range of the history, or three in a row on the same side moving towards the old level.

3 · The holding chart and the drift conversation

From Chapter 1. Read monthly by the keeper; the conversation is held within a fortnight of the drift rule being met.

The chart. Plot the result measure each month against its history, with the programme period marked. Beneath it, on the same page and the same time axis, plot the practice measure.

Reading the two lines together.

RESULT LINE	PRACTICE LINE	WHAT IT USUALLY MEANS
Holds	Holds	The change is being kept. Say so at the review, briefly.
Drifts	Holds	The conditions around the change have shifted. Look at demand, mix, inputs.
Holds	Falls	Something else is holding the result up. The change itself may be fading.
Drifts	Falls	The change is going home. Hold the conversation now.

The drift conversation (thirty minutes, four questions, in order).

1. What has changed in the last two months in the conditions that held the improvement: people, hours, equipment, instructions, demand?
2. Is the practice still being done as it was? If not, what is in its way?
3. Does the change need adjusting to fit the new conditions, rather than restoring?
4. Who will do what, by when?

Avoid. Opening with *who let this slip*. A relaunch with new posters. Changing the drift rule in the month it is met.

Closing the holding read. When the practice is in the role descriptions, in induction and in the budget, and the lines have held through each pressure named on page 2, the result joins the ordinary report. Add a line to page 1.

4 · The record of cuts

From Chapter 2. Opened once improvement time is protected (days thirty-one to seventy), kept by the planner or keeper, read at the monthly review.

The protected time. What it is: How much, how often: Where it is written in the operation's own plan:

DATE	TIME GIVEN UP	WHO DECIDED	REASON	TO BE RESTORED BY	RESTORED ON

The dip, forecast in advance. Expected cost in output or time: Expected to last until: Told to:

Reading it. A cut is not a fault. An unrestored cut is the beginning of the capability trap. Read the page beside any breakdown or recurrence: did it follow a cut, and how long after?



5 · The quiet ledger

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5 · The quiet ledger

From Chapter 2. Read once a month, at the review where rescues are discussed.

Only things with a trace: a planned stop held, a part replaced and found worn, a defect caught before it shipped, a complaint that did not recur because its cause was fixed.

MONTH	WHAT DID NOT HAPPEN	THE EVIDENCE	WHO OR WHAT PREVENTED IT

One measure of the trap loosening. Each month, the share of work that was planned rather than reactive (or, in an office, new work rather than rework and chasing): per cent.

For performance conversations. *What did you prevent this year, and how do we know?*

6 · The routine walk sheet

From Chapter 3. Used in days twenty-one to fifty, at the routine's hardest hour; repeat after four weeks.

The hour: (ask the people who do the work which hour it is) Whose work: Agreed with them beforehand: yes / no

Before starting, say: *I am here to find out what the work answers to, not to check whether you follow the routine.* Do not correct anything during the walk. Ask what prompted a step after it, never during.

STEP	WHAT WAS DONE	WHAT PROMPTED IT (IN THEIR WORDS)	NEW ROUTINE OR OLD?

Afterwards (ten minutes, with the person). Which steps felt like the new way? Which felt like the old way, and what made the old way easier at that moment? What have you changed about the new routine, and why?

Reading it. The third column is the input to page 7. A person who meant to do the new routine and did not is meeting a cue. A person who chose the old one and can say why is raising an objection; take it to page 8.

7 · The artefact inventory

From Chapter 3. Filled from the walk sheets.

KIND OF ARTEFACT	WHAT IT IS HERE	PROMPTS OLD ROUTINE OR NEW?	WHO CAN CHANGE IT	CHANGED ON
Defaults of a system (opening screen, standard option)				
Order in which work arrives or is listed				
Forms and templates				
Reports, and the measures people are read against				
The room: who sits where, who is in earshot				
The first move of the day or shift				
What is praised, and where				

The order of changes. The cheapest cue that prompted the most old steps first. Then reports and measures. Then the room and the order of the day. Train only after the cues have changed, and briefly.

Adaptations. Each change the team makes to the new routine is written here with its reason and decided with the team within a week.

DATE	ADAPTATION	REASON	KEPT, CHANGED OR REVERSED, AND WHY

8 · The objection conversation: run sheet

From Chapter 4. Used in days eleven to thirty, before the design is fixed, with four to six people.

Whom to ask. The people with the longest memory of the work. Those already described as likely to resist. The experienced people who were silent at the briefing.

Where and when. On their ground, at their hours. An hour. Say why: *I think you may know something the project does not, and I would rather hear it now.*

The three questions, in order.

QUESTION	COMMONLY MISHEARD AS	STEER BACK TO
What will this break?	An invitation to argue against the change	Where, on which day, with which piece of work
What happened last time, and what did it cost the people who were there?	An invitation to complain	Listen to the end; do not defend anyone; then ask what they learned
		Walk through a hard day, step by step

QUESTION	COMMONLY MISHEARD AS	STEER BACK TO
What does the old way do that the new one must also do?	A question with an obvious answer	

If the objection seems to protect a fear rather than a fact, the canon's questions, in its words: *What is this person protecting?* and *What would need to be true for this edge to feel safe enough to approach?*

Sorting what you hear.

FORECAST (WHAT WILL HAPPEN)	PREFERENCE (WHAT I WOULD DO INSTEAD)	GRIEVANCE (WHAT THIS HAS COST BEFORE)

Forecasts go into the design, tested where possible. Preferences are weighed and answered. Grievances are acknowledged as history, and the forecast inside each is tested.

The record of what changed because of an objection.

RAISED BY (WITH PERMISSION)	THE POINT	WHAT CHANGED IN THE DESIGN	DATE	TOLD TO THEM ON

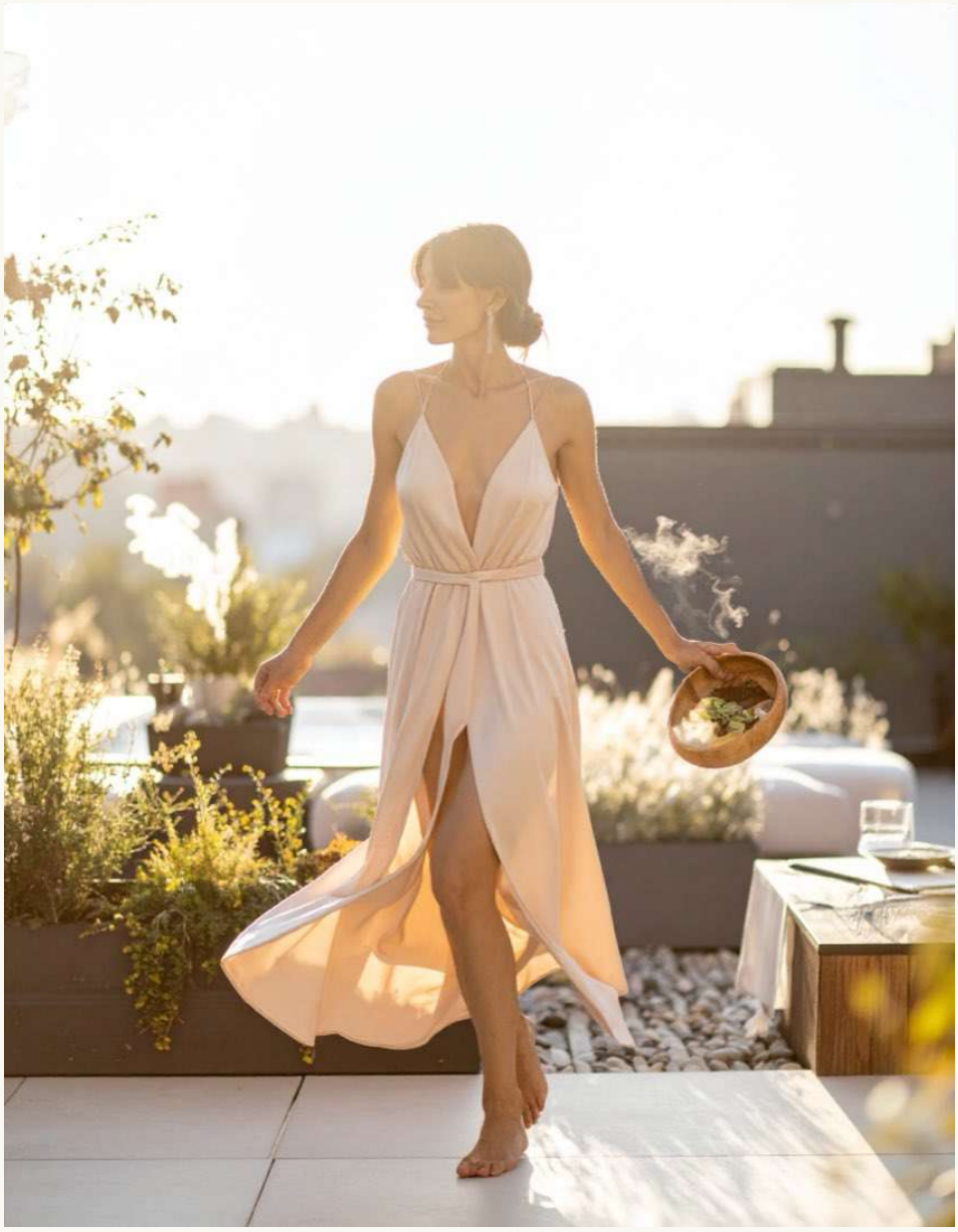
Avoid. Holding the conversation after the design is fixed. Persuading. Taking the knowledge and leaving out the name.

9 · The loss timeline

From Chapter 4, after the canon's practice. Optional, for a team with a heavy history of change. About ninety minutes, with a careful facilitator.

1. A long sheet of paper on the wall, marked in years, as far back as the longest-serving person in the room remembers.
2. Each person marks the changes and losses they lived through at work: reorganisations, systems, departures, closures, programmes. One sticky note each, with a word on what it cost.
3. The group stands in front of the whole sheet, without discussion, for a few minutes.
4. Then three questions: what do you notice? What did we learn from the changes that lasted? What should this change do differently?
5. The facilitator records the answers to the third question and promises, out loud, that they will be read before the new design is fixed. Then they are.

It is not therapy, and should not be run as therapy.



10 · The carrier's inventory and the moves

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10 · The carrier's inventory and the moves

From Chapter 5. Used in days fifty-one to eighty.

Two ways to find the tasks. A week's diary kept by the champion of every action taken because of the change. And the question asked of the team: *what does she do for this that you would notice if she stopped?*

TASK	VISIBLE OR RELATIONAL?	STRUCTURE THAT WILL HOLD IT	WHO NOW DOES IT	MOVED ON
Sends the invitation		Team calendar		

TASK	VISIBLE OR RELATIONAL?	STRUCTURE THAT WILL HOLD IT	WHO NOW DOES IT	MOVED ON
Books the room		Standing booking		
Chooses the material		Rota, with a note on how to choose		
Protects the time		Fixture in the shift plan or schedule		
Checks the follow-up				
Tells the people above		Line in a regular report		
Makes it safe to speak	Relational	Shared: lead, co-lead, sit beside, absent		

Structures that remain. A team calendar or shared mailbox. A standing booking. A rota. A fixture in the operation's plan. A line in a regular report. A sentence in a role description. A page in induction.

11 · The absence review

From Chapter 5. The champion steps away for two weeks (a weekly practice) or a month (a monthly one), is not consulted, and the team records each week what ran. The review is held in the week she returns, about an hour.

WEEK	WHAT RAN	WHAT DID NOT	WHAT WAS DONE DIFFERENTLY

The review questions, in order.

1. What ran without her?
2. What stopped, and why?
3. What was done differently, and is it better?
4. What task is still hers that should not be?

The answers to question 4 go back onto page 10. Two rehearsals before a real departure is a good result.

The successor conversation, when the real departure comes. The inventory, the moves and the last absence review on the table. *Will you keep this? What would you change?*

12 · The ninety days on one page

From Chapter 6.

DAYS	PRACTICE	WHO	TIME IT TAKES	WHAT IT PRODUCES	EARLY SIGN IT IS GOING WRONG
1–10	Read the record: past changes, the practice list, a dated copy of the result's history, whom to hear (pages 1, 2)	Sponsor, convenor, long-memory member	Sponsor about 3 hours a week	A first-guess page: how this change is most likely to be lost	The record of changes is skipped
11–30	The objection conversations; the holding agreement signed (pages 2, 8, 9)	Sponsor or keeper; keeper and finance	An hour per conversation; an hour for the agreement	Forecasts, design changes, a signed agreement	An objector goes quiet
21–50	The routine walk and the artefact inventory (pages 6, 7)	Working group, with an objector	An hour per walk; repeat in four weeks	Cues changed; adaptations decided	The second walk finds the same old steps
31–70	The protected hour and the quiet ledger (pages 4, 5)	Sponsor and the owner of output; keeper	Monthly reading, 15 minutes	Time held; prevention made visible	A cut not restored
51–80	The carrier's inventory, the moves, the rehearsed absence (pages 10, 11)	Champion, team	A week's diary; two weeks' absence	Tasks in structures; an absence review	The inventory has no relational tasks
11–90 and after	The holding read (pages 2, 3)	Keeper	An hour a month	A chart, two lines, drift conversations	The chart is read and not discussed

13 · The day-ninety review

From Chapter 6. A meeting of the group and the sponsor, about two hours.

Bring the record of changes, the first-guess page, the objection records, the walk sheets and artefact inventory, the record of cuts and the quiet ledger, the carrier's inventory and absence review, and the holding chart.

Ask, in order:

1. Where was the first guess right, and where was it wrong?
2. Which forecasts from the objection conversations have come true, and were they caught?
3. Is the new routine performed at the hardest hour? What still prompts the old one?
4. Has the protected time been cut, and was it restored?
5. What ran without the champion, and what is still hers?
6. What do the holding line and the practice line show, together?

7. Which force from the record of changes is still present?

And the canon's prompt, for the group's own agreements: *How are we doing with our agreements? Where are we strong? Where have we drifted?*

What not to conclude. That the change has held (ninety days show whether the conditions for holding it are in place, not whether it has met every pressure). That one good month is a kept gain. That a meeting still held is a practice still alive.

Closing the programme. The closing report names what was found, what is being held, by whom, how it is read, and when the holding read ends.

14 · The first Monday

From Chapter 6. For anyone who wants to begin with less.

- Write down the last three changes your part of the organisation made to work like this one, and what each is doing now.
- Choose one practice that produced this change's result. Count, each week, whether it is still being done. Put the count beside the result.
- Ask the person who carried the change what she does for it that nobody else would notice if she stopped. Write the answer down.

The improvement that stays

Most improvements that fade were not rejected. They were left unread in the months after they were declared done, and those months can be given an owner and a measure.

Luminous Prosperity Inc. takes this work into organisations as a gainshare. The flow is opened from the inside, with the people who already hold what the firm knows. The gain is counted from records the firm already keeps, against a measure both sides sign before anyone knows the answer, and the house is paid as a share of what is found: between thirty and ten per cent of it.

This book sets out ninety days for one change. Which of your own are quietly coming undone, and what keeping them would return, is read from your records and your people. That begins with a conversation.

REQUEST A CONVERSATION

References

1. Sources for this chapter: The sources behind these pages are given in full in the notes to Chapters 1 to 5: Lewin (1947), Hughes (2011), Buchanan and colleagues (2005), Scheirer (2005) and Wiltsey Stirman and colleagues (2012) for pages 1 to 3; Repenning and Sterman (2001) and Perlow (1999) for pages 4 and 5; Feldman and Pentland (2003), Feldman (2000), Wood and Neal (2007) and Pentland and Feldman (2008) for pages 6 and 7; Ford, Ford and D'Amelio (2008), Piderit (2000) and Oreg, Vakola and Armenakis (2011) for page 8; Miech and colleagues (2018), Greenhalgh and colleagues (2004) and Kotter (1995) for pages 10 and 11; the sorting of forecasts, preferences and grievances follows *Where the Flow Stops*, Chapter 1; Santa Anna, A. *Edge Cultivation*, "Kegan and the Immunity to Change"; *Organizational Soul Work*, "Movement III: Grief Work"; *Psychological Safety Architecture*, "Norm Tending as Ongoing Practice". The Luminous Developmental Canon; The times given are planning guides from practice, not findings of a study.

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