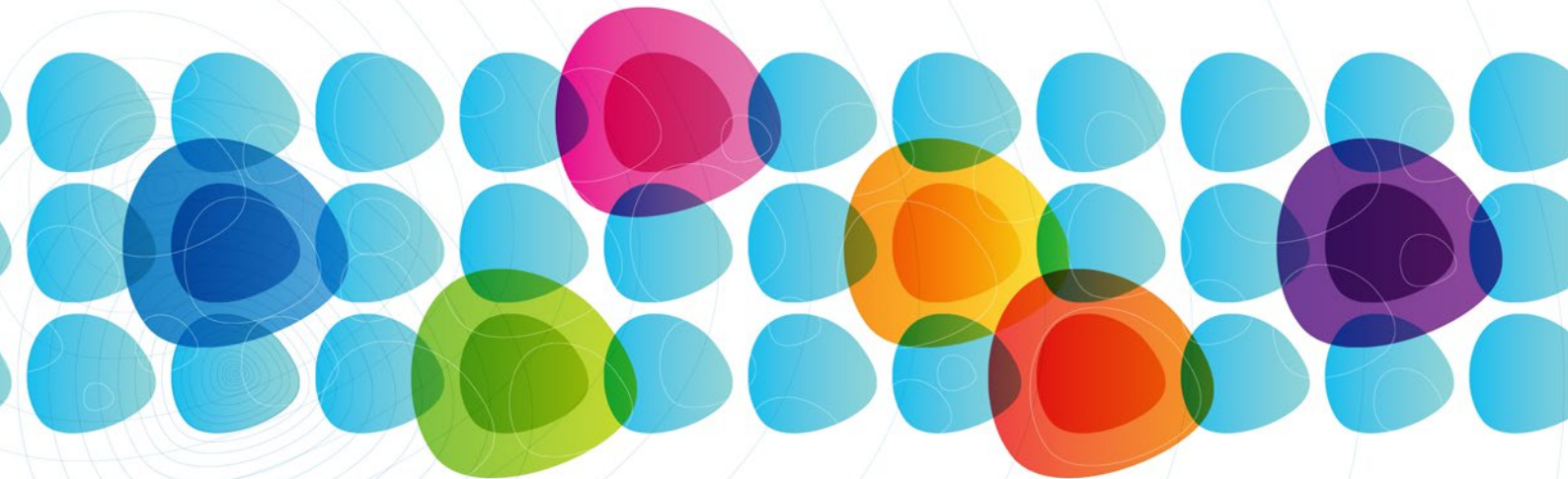


WHITE PAPER

A Research-based Exploration
of the Role of the Change Agent
in Organisational Change



Practical thinking
Coaching
Mentoring
Convincing

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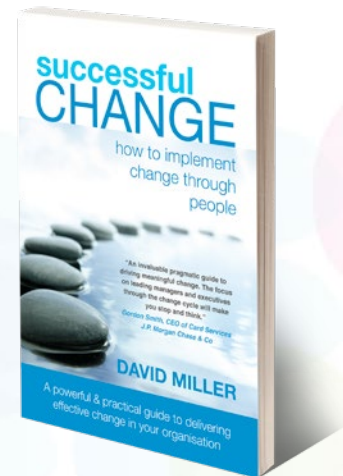
The “Accidental” Change Agent

*We find that people
often enter the
change community
“accidentally”*

The inspiration of this white paper came from Changefirst’s founder, David Miller, when he was reflecting on how he became a Change Agent more accidentally than on purpose. We think this mirrors the experience of many other Change Agents and wanted to explore the role in more detail.

In his book – Successful Change – David describes his experience of becoming a Change Agent.

In the early 1980’s whilst David was working for a large, global US company he was sent to California to work on a large transformation project where the brief was to work on creating new processes and build self-directed teams that were designed to streamline the management structure and improve decision-making. The company itself had huge challenges including issues with profitability and David made the trip with very much a technical mindset and the idea that process redesign and some sound HR techniques would solve the issues.



The “Accidental” Change Agent

What David found was a much more complex situation than he could have imagined including:

- The CEO clearly thought that David should be single-handedly creating change
- David’s peers thought that he should publicly challenge the CEO on both the pace and depth of change
- There was a group of middle managers, who hated the idea of self-directed teams
- This created a highly volatile mix of uncertainty, ambiguity, internal politics and power struggles

It meant that far from solely re-designing processes David was effectively forced into the role of a Change Agent, and he has been working in the area ever since. It was an “accidental” career choice that we find is not uncommon within the change community.

Thirty years on, David continues to encounter the scenario above as he works with clients across the globe and it’s more or less what made us put pen to paper on the subject.

What does the typical job description for a Change Agent look like?

A Change Agent acts as an 'Evangelist' for the process of Change Management

In our view the role of the Change Agent is a mixture of dynamics which incorporate practical thinking and softer skills like coaching, mentoring and convincing.

The key roles and responsibilities can very often look like the following:

Key roles and responsibilities of Change Agent

Help build and then execute overall change plan

Act as Change Agent for work-streams

- *Create any specific work-stream packages e.g. specific training packages*
- *Co-ordinate work-stream change plans with countries to minimise adverse impact*
- *Analyse impact on people and assess readiness to change*
- *Act as Change Agent for geographies who do not need Change Agent*

Track change management progress and propose remedial action where necessary

Work with HR to provide support and coaching to executives on key change actions

Take on the overall pushing, reminding, motivating, unblocking and convincing essential for the project to succeed

Act as 'evangelist' for the process of change management

What does the typical job description for a Change Agent look like?

However we were keen to look a little deeper than the job description and get a better understanding of the role of the Change Agent particularly:

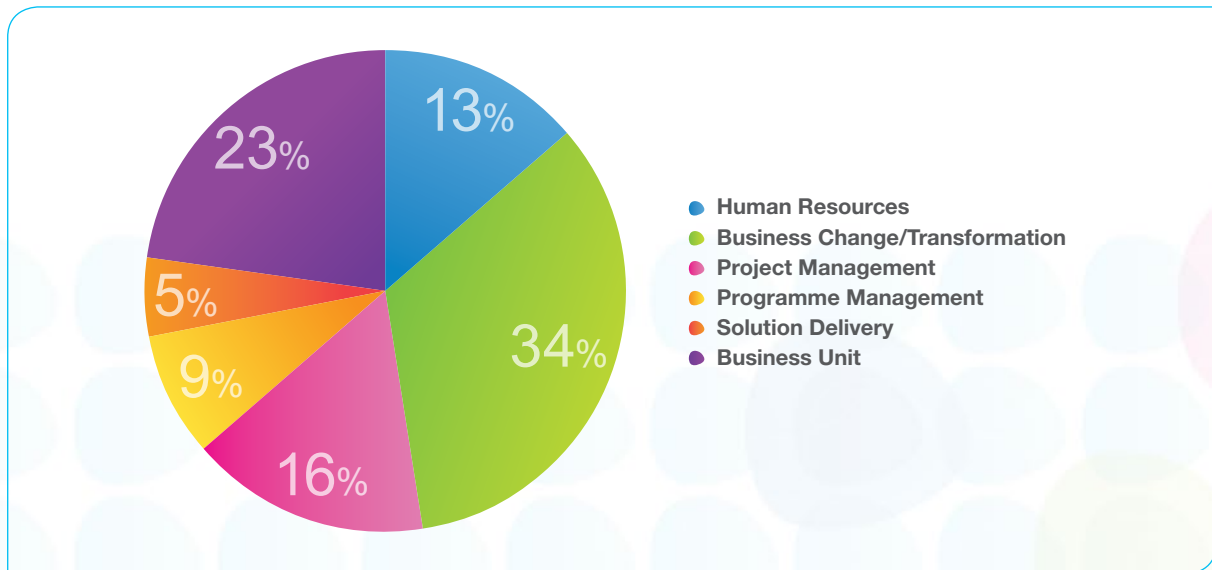
- Key challenges faced
- What makes some more successful than others
- Key skills needed to do their jobs
- How they rate themselves in terms of these key skills
- What this means for you and your organisation

That is the focus of this white paper and we will start by giving some context for the research that is central to our findings.

The Changefirst Community's response

We conducted an online survey with our change community in May 2011 which was sent to over 4,000 change practitioners globally. 190 completed the survey and their profile breaks down as follows:

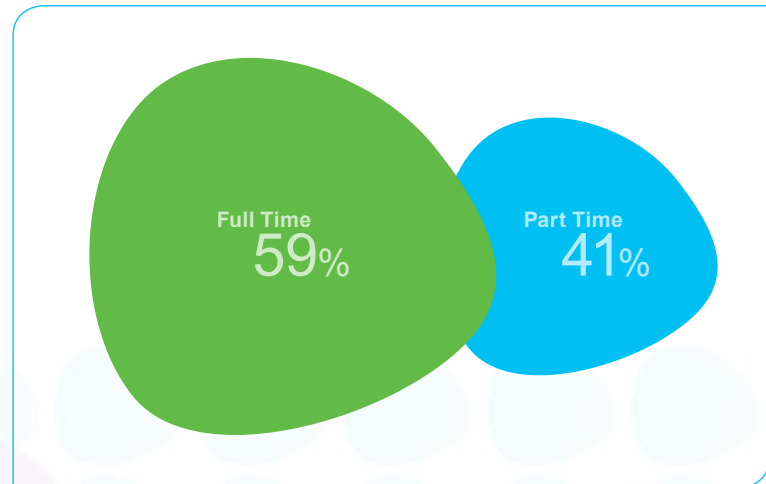
What function do you work in?



There is a relatively good spread of functional roles across disciplines including HR, Business Change Transformation, Programme Management, Business Unit Management and to a lesser extent Solution Delivery.

The Changefirst Community's response

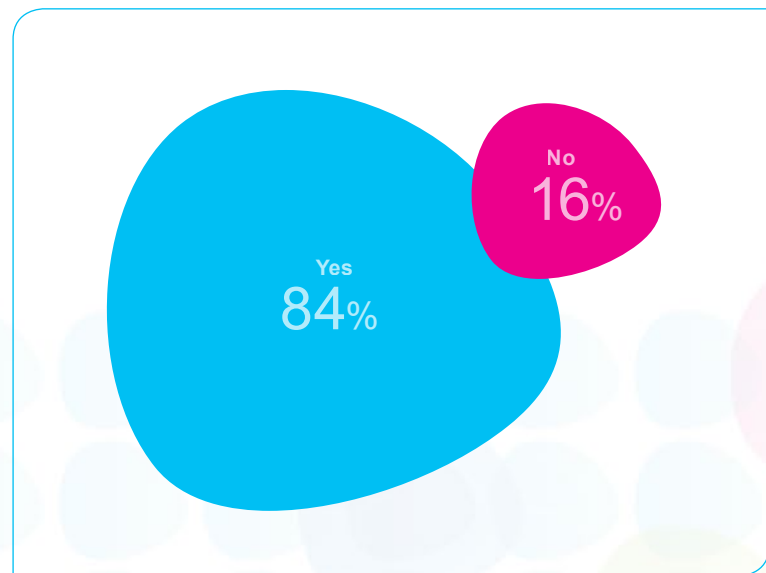
Is your role as a Change Agent full-time or part-time?



Part-time Change Agents are well represented in the survey, although, as you might expect there are slightly more full-time agents in overall terms.

The Changefirst Community's response

Have you gone through formal organisational change management training?



There is a heavy bias towards Change Agents who have been through some form of organisational change management training which probably reflects the respondents who have been through our own formal workshops.

The Changefirst Community's response

How many years experience do you have as a change practitioner?

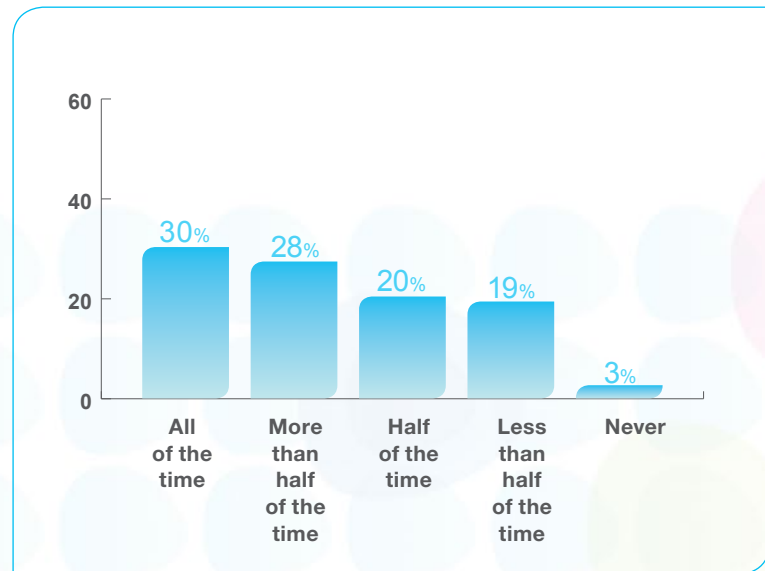


There is a reasonable spread of years' experience amongst respondents, although there are relatively more with 5+ years experience than either 0-2 or 2-5 years.

The Changefirst Community's response

How often do you use a change management methodology in your change initiatives?

Finally, there was a strong pre-disposition to using a change management methodology with over 78% using one half of the time or more regularly.



The Changefirst Community's response

A group that sees itself as more successful than the norm

Before we delve more deeply into the research findings, it's useful to point out one initial finding that stood out more than any other in the early part of the analysis.

What percentage of your change projects do you qualify as successful in achieving the intended goals?



The Changefirst Community's response

We asked respondents to rate the percentage of change projects that they qualified as successful in terms of achieving goals – from both a personal and organisational standpoint. As you can see from the graph on page 14 the differences between personal and organisational success criteria were slight overall.

However the stat that really stood out for us here is that a very significant percentage of respondents, 50%, see themselves as delivering on 75% or more of projects.

This is a figure that clearly bucks the trend in terms of published failure rates on change.

Strong validation of full time roles, formal training, use of methodology and experience

A more detailed look at the results uncovers some interesting differences between those who stated that 75% of projects were successful versus 50% or less.

	More than 75% of projects successful	50% or less of projects successful
<i>Full-time Change Agents</i>	61%	39%
<i>Attended formal training</i>	63%	37%
<i>Use a change methodology more than 50% of the time</i>	73%	27%
<i>More than 5 years Change Agent experience</i>	70%	30%

Full time versus part-time Change Agents

There is a big difference in project success between full time and part time Change Agents – with 61% of those reporting project success in more than 75% of projects versus 39% who reported 50% or less. This is something which is regularly borne out in our other survey work including **Change in a Downturn** and the *Unplayed Piano*. The key here is that, like many disciplines, you only really improve performance in a role through getting the chance to practice and by definition full-time Change Agents get more opportunity than their part time counterparts.

Strong validation of full time roles, formal training, use of methodology and experience

Formal change training

Formal change training clearly has an impact on success getting on for a factor of 2.

Use of a change methodology

Those using a change methodology more than 50% of the time are also more likely to be successful – in this case almost by a factor of 3.

Level of experience

It's also clear that the most experienced Change Agents are significantly more effective. This is something that tends to debunk the idea of the successful amateur Change Agent and is consistent with the work that *Malcolm Gladwell* has done around how you build up mastery over time – in his book the **Tipping Point**. In Gladwell's view, in order to get good at something you have to have done more than 10,000 hours of it. In practical terms, for a Change Agent working for 200 days a year at 7 hours a day on average, you would take somewhere around 7 years to build up the experience required – something which has been borne out in other studies in this area.

Key Challenges Change Agents face

We asked our sample to identify the top 2 challenges they face in delivering successful change and the results are shown below:



The first 6 of these are the Critical Success Factors (CSFs) from our own PCI methodology – the first 3 being at the organisational level – about creating vision and urgency for the change – and the bottom 3 more tied to local level issues relating to building personal connection to the change. However, we added in a couple of additional relevant factors including securing sufficient resources for change and being able to apply change management tools, methods and techniques.

Key Challenges Change Agents face

With the exception of a strong indication that securing resources is a key concern, it is the local level issues that appear to be of most concern. This is something that is borne out regularly in our own data. Both ourselves and clients regularly use our own Initiative Legacy Assessment which highlights areas of change risk and what we tend to find is that organisations are better at the first three factors – the organisational ones – but less effective at managing the next three – which are more about local factors.

The top three organisational factors can lead to acceptance for a specific change but if you really want commitment then the local factors become incredibly important, although they are much harder to do. They are about working with middle management and users to get the level of personal buy-in that is needed for people to take the change fully onboard. This is why organisations focus a lot of time and energy here, but is also where you tend to get the most pushback. For example, one of the most common complaints we hear from middle managers is that they only hear about change at the same time as their staff do. This can lead to a lot of resentment and resistance that can be avoided with more careful communication and involvement of this key tier of management.

Key Challenges Change Agents face

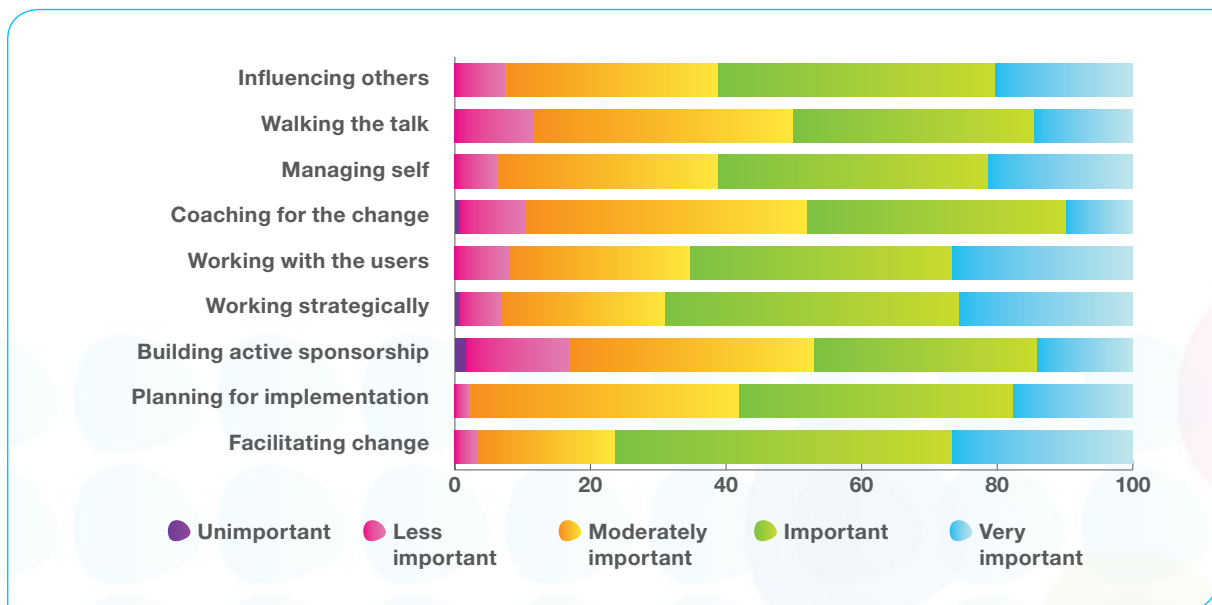
The relative importance of certain skills and abilities

We then asked our respondents to consider the relative importance of key skills and abilities for a Change Agents role as follows:

Dimension	Involves
<i>Influencing others</i>	<i>Influencing key people in the organisation to gain their support for the change</i>
<i>Facilitating change</i>	<i>Using facilitation tools and techniques to enable others to plan and execute change</i>
<i>Planning for implementation</i>	<i>Collating and integrating people-centred actions into a project plan</i>
<i>Building active sponsorship</i>	<i>Working with and coaching executives and managers to help them role model the change</i>
<i>Working strategically</i>	<i>Demonstrating a clear commitment to the change vision and connecting change plans to business goals</i>
<i>Working with the users</i>	<i>Working with front line staff and their managers to engage them and support them through the change</i>
<i>Coaching for the change</i>	<i>Training others to be effective in change management</i>
<i>Managing self</i>	<i>Managing yourself effectively through periods of uncertainty and ambiguity</i>
<i>Walking the talk</i>	<i>Role modelling the behaviours required by the change</i>

Key Challenges Change Agents face

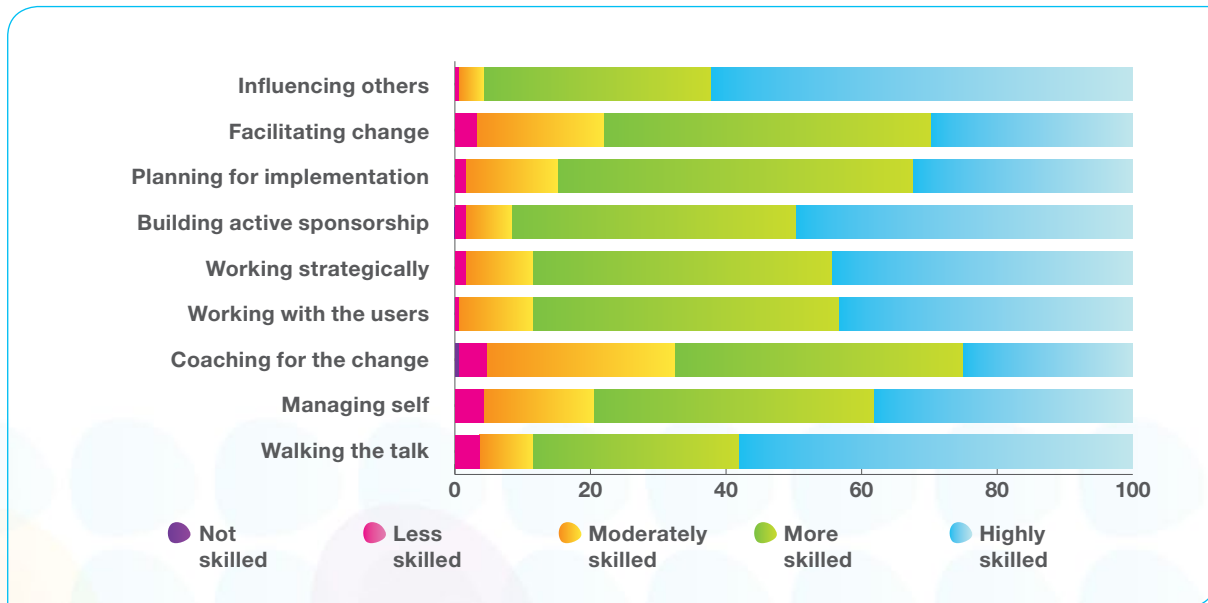
The chart below shows how survey respondents ranked key challenges in terms of importance:



It's clear that the ability to influence others, building active sponsorship and walking the talk are seen as key but they are closely followed by most of the other skills.

We then asked respondents to rate their own skills as a Change Agent against the same list.

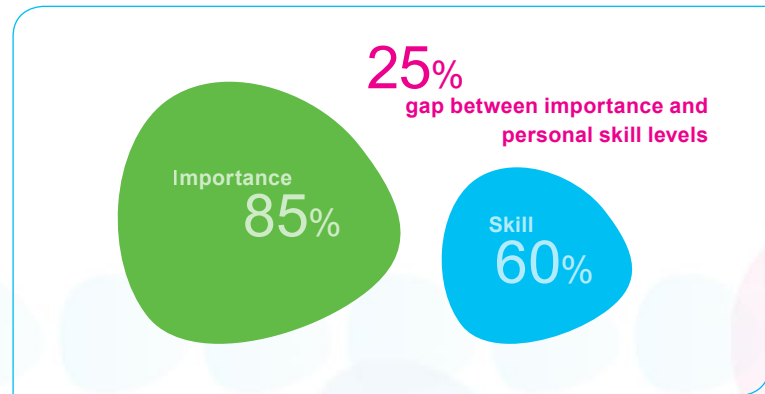
Key Challenges Change Agents face



Interestingly the biggest skill needs were in terms of coaching for change and building active sponsorship – the latter being something that consistently turns up as a major issue in our workshop work with clients across the board.

Key Challenges Change Agents face

However, perhaps the most interesting finding in this section of the research was the fact that in looking at each of the dimensions above we find on average a 25% gap between importance and personal skill levels.



On average 85% of respondents ranked each of these dimensions as “important” or “very important” but only 60% of respondents ranked their own personal skill as “more skilled” or “highly skilled”

Interestingly this more or less applies regardless of profile, for example, even the group of highly experienced Change Agents who regularly use a change methodology identify this type of gap and right across the 9 skill areas too.

Why this might be is outside the scope of this paper but an area we would like to revisit in future work.

Conclusion

There are a number of key findings:

- Factors like level of experience, whether individuals have attended formal training or not and frequency of use of a change methodology all have an important bearing on success.
- These factors can lead to an above average level of project success – which can be by as much as a factor of 3, as in the case of using a change methodology more than 50% of the time.
- Local critical success factors such as gaining the support of middle and front-line managers, helping people develop commitment & ownership of change and managing people's resistance and anxieties during change remain the most challenging issues – something which is borne out regularly in the work we do with clients. However, these factors are more difficult to deliver and you need to focus a lot of time and energy here to ensure you are successful.
- The more intangible factors like “walking the talk” and influencing others are seen as key skills but it is fair to say they are closely followed by many of the other skills we highlighted in our survey.
- One of the most striking findings in our research was that respondents generally felt they had skills gaps of around 25% across the board and the biggest of these was in building sponsorship.

What does this mean for you and your organisation?

- 1 The role of the Change Agent remains a tough and often complex role dominated by some very untidy practical issues that range from uncertainty, politics and power to downright ambiguity. Part of the role is to recognise these issues and successfully navigate them in addition to the more practical aspects of the role.
- 2 It is clear from this and also previous findings that key factors – like formal training, depth of experience and regular use of a methodology – do help and will have a bearing on success or otherwise for the individuals and ultimately the organisations involved.
- 3 Gaps remain in soft skill application and CPD for Change Agents should be focused on soft skills development.
- 4 The idea of putting people in change roles for their development we think is flawed. The role of the Change Agent is a professional role better done by experts than part-time untrained amateurs and the implications for productivity and project success are clear from the data.
- 5 For organisations the focus has to be on taking a structured approach to building organisational change capabilities through key activities like the formal and consistent use of a change management methodology and providing formal change management training for a full-time cadre of change management specialists.

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About Changefirst

- Since 1995, Changefirst have been transferring change management skills, processes and tools inside organisations to help them deliver change successfully. In that time, over 14,000 people have LEARNed our proven People-Centred Implementation (PCI) methodology in more than 45 countries around the world. Around half (over 6,500 people) continue to APPLY PCI via our online application e-change, and more than 330 in-house PCI Master Trainers help to EMBED the capabilities inside their organisation.
- Our clients choose us because: they need to deliver specific changes whilst developing internal change management capabilities; they require a scalable, robust methodology that is easy to access, simple to use, it works, integrates with their project framework and is value for money. Our clients include The Linde Group, Novartis, Initial Rentokil, Virgin Media, HSBC, Network Rail and MSA.
- We have one of the largest global Organisational Change Management research and assessment databases that enables clients to benchmark their change performance against approximately 2,000 entries for our core assessment tools.
- We are regularly invited to share our thought leadership on the international speaker circuit by the likes of ACMP, APMG and PMI.
- We are based in the UK, Australia and Brazil and have a global delivery capability.

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