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SAN DIEGO

Organizational Change Management | Introduction

Your Guides: Sara Garvey and Grant Zemont

Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

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Our Experience

"I want you to find a bold and innovative way to do everything exactly the same way it's been done for 25 years."

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Open Mic

- What do you think **Organizational Change Management** means?

- Does your organization consider Organizational Change Management around project delivery? If so, how?

Goal of Change Management

To enable individuals to adopt new values, skills, and behaviors so that business results can be achieved for the organization as a whole.

It is fundamentally about people.

Change Management, Jeffrey Hiatt and Timothy Creasey

Top Reasons for Employee Resistance

1. Lack of Awareness of Why a Change is Needed

2. Change Specific Resistance

3. Change Saturation

4. Fear

5. Lack of Support from Management or Leadership

[1] Adapted from The Standard for Change Management©, Association of Change Management Professionals (ACMP)
[2] PROSCI Best Practices in Change Management, 2014

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The Top Reasons for Manager Resistance

1. Organizational Culture

2. Lack of Awareness and Knowledge About the Change

3. Lack of Buy-in

4. Misalignment of Project Goals and Personal Incentives

5. Lack of Confidence in their own Ability to Manage the People Side of change

[1] Adapted from The Standard for Change Management©, Association of Change Management Professionals (ACMP)
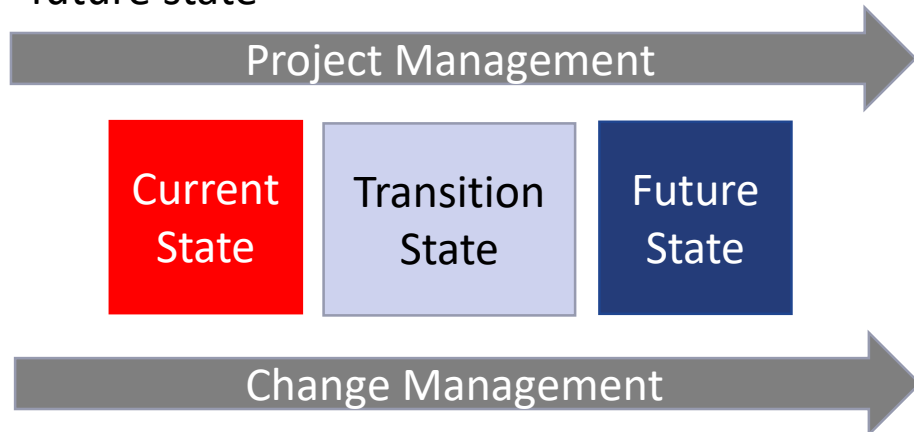[2] PROSCI Best Practices in Change Management, 2014

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OCM Framework

How do we do this?

Comparing Change Management & Project Management

Technical Side of moving from current to future state

Project Management →

| Current State | Transition State | Future State |

People Side of moving from current to future state

Change Management →

Process:
- Initiation
- Planning
- Executing
- Monitoring/controlling
- Closing

Tools:
- Statement of Work
- Project Charter
- Business case
- Work breakdown structure
- Budget estimations
- Resource allocations
- Schedule
- Tracking

Process:
Organizational:
- Preparing for change
- Managing change
- Reinforcing Change
Individual:
- ADKAR

Tools:
- Individual change model
- Readiness assessment
- Communication plans
- Sponsor roadmaps
- Coaching plans
- Training plans
- Resistance management
- Reinforcement

[1] Adapted from The Standard for Change Management©, Association of Change Management Professionals (ACMP)
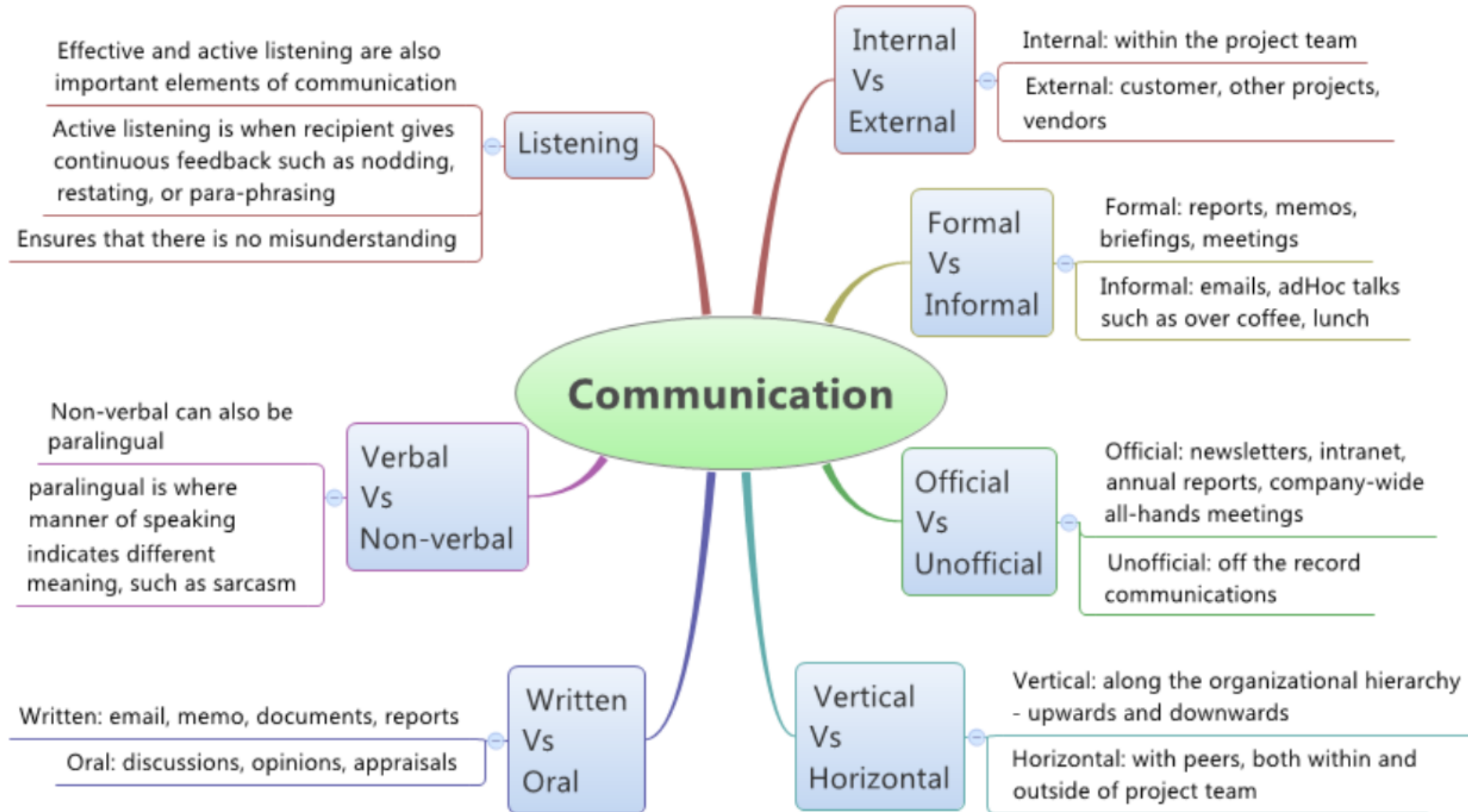[2] PROSCI Best Practices in Change Management, 2014

This is all great – but….

What if you don't have a dedicated Change Manager or full Sponsor support?

What Change activities can you complete to be successful?

1. **Provide crystal-clear communication**
2. **Consider your culture**
3. **Pace yourself**
4. **Create accountability**
5. **Measure your success**

Provide Crystal-Clear Communication

Effective and active listening are also important elements of communication

Active listening is when recipient gives continuous feedback such as nodding, restating, or para-phrasing

Ensures that there is no misunderstanding

Listening

Internal Vs External

Internal: within the project team

External: customer, other projects, vendors

Formal Vs Informal

Formal: reports, memos, briefings, meetings

Informal: emails, adHoc talks such as over coffee, lunch

Communication

Non-verbal can also be paralingual

paralingual is where manner of speaking indicates different meaning, such as sarcasm

Verbal Vs Non-verbal

Official Vs Unofficial

Official: newsletters, intranet, annual reports, company-wide all-hands meetings

Unofficial: off the record communications

Written: email, memo, documents, reports

Oral: discussions, opinions, appraisals

Written Vs Oral

Vertical Vs Horizontal

Vertical: along the organizational hierarchy - upwards and downwards

Horizontal: with peers, both within and outside of project team

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Consider Your Culture

Culture is like the wind. It is invisible, yet its effect can be seen and felt.

When it is blowing in your direction, it makes for smooth sailing. When it is blowing against you, everything is more difficult.
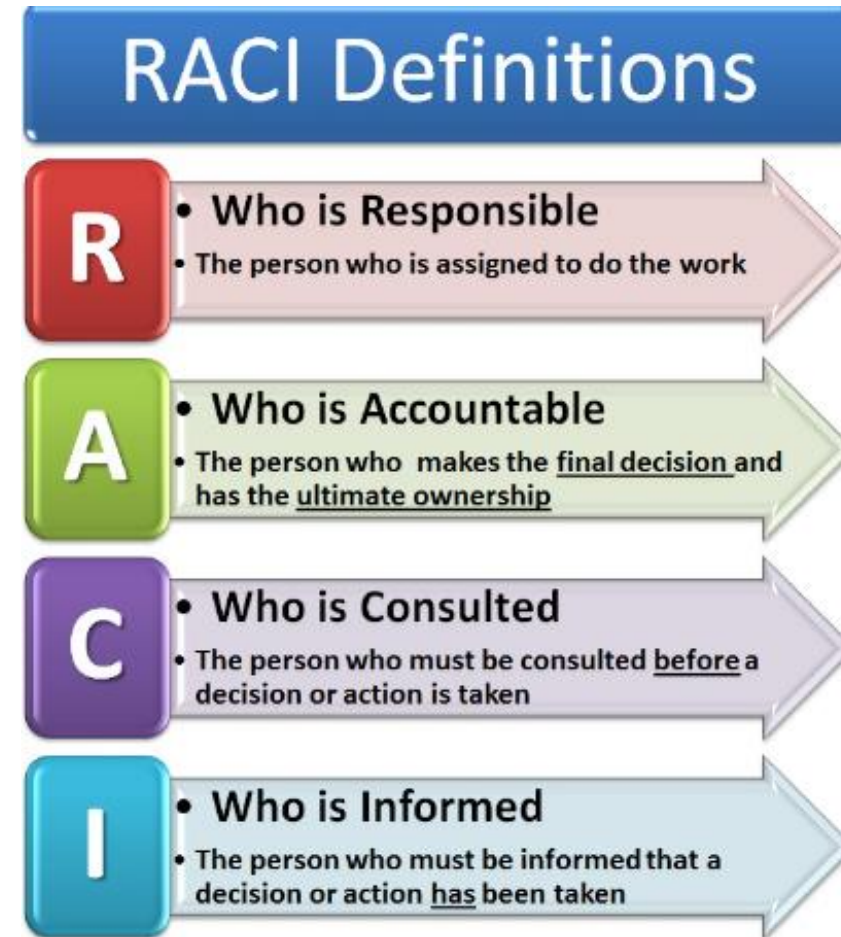
Pace Yourself

Remember, keeping pace with employees and meeting them where they are will allow you to lead your change effectively and keep the doors of communication open throughout your change effort.

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Create Accountability

Giving your employees a well-defined set of responsibilities can empower and engage them because they feel they have a hand in the organization's plans for change.

RACI Definitions

R
- Who is Responsible
- The person who is assigned to do the work

A
- Who is Accountable
- The person who makes the final decision and has the ultimate ownership

C
- Who is Consulted
- The person who must be consulted before a decision or action is taken

I
- Who is Informed
- The person who must be informed that a decision or action has been taken

Measure Your Success

1 – Adoption Metrics

2 – Qualitative/feedback metrics

3 – Employee Performance

4 – Overall Project Performance

5 – Readiness Assessment

Collect the employee feedback and compliance information

Analyze the data; look for patterns and themes
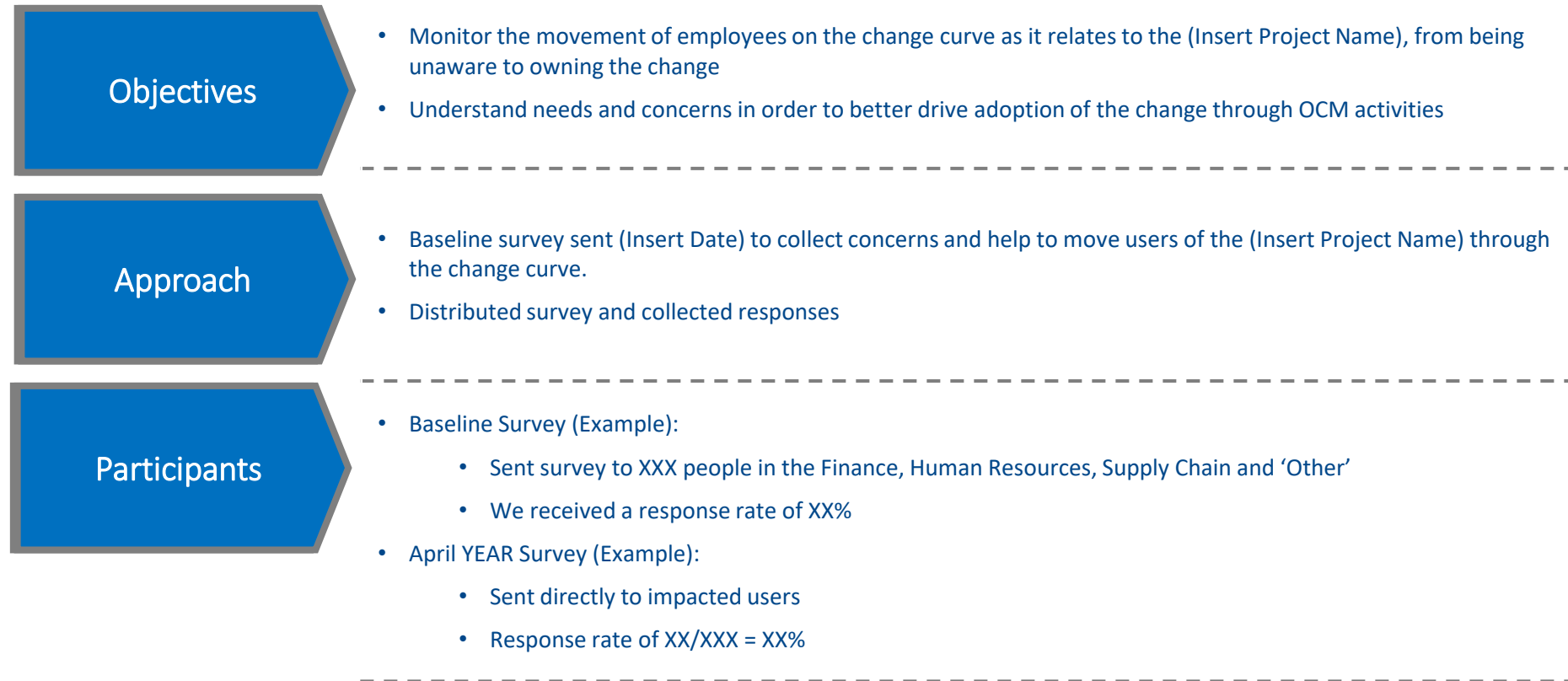
Prepare summaries of key findings

Organize findings so that they can be quickly and easily understood

Evaluate the overall effectiveness of the change management program and identify any weaknesses

Change Readiness

A change readiness assessment will provide the information necessary to drive adoption in the organization.
Its recommended the survey is sent at the start, middle, and end of the project. The results will provide metrics to show you how well your teams adopt and move through the change curve

Objectives

- Monitor the movement of employees on the change curve as it relates to the (Insert Project Name), from being unaware to owning the change
- Understand needs and concerns in order to better drive adoption of the change through OCM activities

Approach

- Baseline survey sent (Insert Date) to collect concerns and help to move users of the (Insert Project Name) through the change curve.
- Distributed survey and collected responses

Participants

- Baseline Survey (Example):
    - Sent survey to XXX people in the Finance, Human Resources, Supply Chain and 'Other'
    - We received a response rate of XX%
- April YEAR Survey (Example):
    - Sent directly to impacted users
    - Response rate of XX/XXX = XX%

Example Survey Questions

Example Readiness Assessment Questions:
Readiness Category
Vision for the Change
Users of the (Insert Project name here) have a history of handling change pretty well.
I understand the objectives and goals of the (Insert Project name here).
I believe the (Insert Project name here) is necessary.
Management
My manager helps me understand how (Insert Project name here) changes impact me and my work.
I am satisfied with the clarity of the information I have received from my immediate manager about the changes.
My manager speaks positively and is a champion for (Insert Project name here) changes.
My manager understands the importance of (Insert Project name here) and how it affects me.
Individual Capability
I understand how (Insert Project name here) impacts me.
I understand how things will be different when (Insert Project name here) is rolled out.
The (Insert Project name here) will help me do my job better.
I am comfortable learning how to use new technologies.
Communication
The communication I receive from the people involved in (Insert Project name here) project is effective.
The information I have received has helped me feel comfortable with how the (Insert Project name here) impact me.
The most effective way for me to receive communications is: (1=most effective, 2=2nd most eff, 3=3rd most eff
I am confident I will receive the right amount of useful information I will need to understand and prepare for (Insert Project name here) changes.
Education and Training
I am confident I will receive relevant training that will enable me to perform any new responsibilities required as a result of the (Insert Project name here) changes.
Reinforcement and Support
I know who to contact if I have questions about (Insert Project name here) project.
I am confident that I will receive adequate support that will enable me to perform any new responsibilities required as a result of the change

Questions?

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Thank You For Attending regoUniversity

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- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
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- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

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Appendix

Change Activities

Provide Crystal-Clear Communication

- Change management translates into staff management, and constant communication is the most effective way for managers to lead employees through change. It's critical to clearly communicate to your staff the reasons for change.

- Use multiple channels to relay essential information to your employees, and repeat the message as often as needed. Leaders can deliver the message to staff verbally in meetings; in written form via email, newsletters and company memos; and visually through videos and PowerPoint presentations.

- Communication is a two-way street. Ask your employees for their feedback and be sure to maintain an open-door policy. Let staff members know they can approach you at any time to ask questions or express concerns. Two-way communication not only can boost your staff's awareness and understanding of change but also can create a sense of trust among your employees and inspire their support for change.

Consider Your Culture

- As you lead change, it's essential to remember your company culture. Tap into your organization's shared values and behaviors to determine how to approach change.

- One way to make things easier on your staff as your business goes through a period of change is to preserve aspects of the current culture. For example, if your small business is growing rapidly, try to hold on to the collaborative atmosphere that you've long maintained.

- Also, work to build a sense of community around the change. Publish updates on the company intranet or in the corporate newsletter, and share stories of how employees are helping each other to adapt to the new status quo. Consider holding social events to help new hires and existing staff (or a newly reorganized team) get to know each other better and learn how they will work together.

Pace Yourself

- Change management is a marathon, not a sprint. It's important to move forward with the right amount of urgency and ensure you achieve each objective without putting unnecessary pressure on your employees. If you move too quickly, your team members can become overwhelmed and may resist change.

- Give your employees time to accept and digest change. But don't drag your feet either and progress too slowly. If you take too long to incorporate change, your employees can lose interest.

Create Accountability

- In times of corporate change, leaders must set clear roles and expectations for their teams and hold them accountable for their actions. Giving your employees a well-defined set of responsibilities can empower and engage them because they feel they have a hand in the organization's plans for change.

- While you should certainly hold team members liable when they make a blunder, it's also very important to give them a pat on the back when they accomplish goals associated with a change. Accountability and appreciation will keep the momentum going.

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Measure Your Success

- One of the biggest mistakes managers make when leading change is neglecting to step back and gauge successes and opportunities for improvement before moving forward. As you reach each objective, it's important to stop, look around and take stock.

- Think about what's working and what's not, which employees are embracing change and which ones aren't. Once you take time to analyze the current situation, you may find it's necessary to make some readjustments before you continue forward.

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