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Introduction to Change Management

PAVRO
LIVE2017



CH-CH-CH-CH CHANGES, TURN AND FACE THE CHANGE

Change is part of our daily lives at work, at home or while volunteering, it is not an option. Managing change is about focusing on the people and the outcomes through the change process.

This presentation will provide an introduction to the fundamentals to manage change with useful templates to get you started and tips and tricks to keep you moving forward.

There will be an opportunity for participants to reflect and to build and create on current practices.

WHAT AM I GOING TO GET FROM THIS COURSE?

- Introduction to change management
- Strategy for change
- Technical side of change
- People side of change
- Change management tools
- Measuring change for success

INTRODUCTION TO CHANGE MANAGEMENT

It is not the strongest or the most intelligent who will survive but those who can best manage change. --Charles Darwin



INTRODUCTION TO CHANGE MANAGEMENT



Activity

Activity - What is Change

Stand Up – Make Room and form Groups of about 8 in a circle

Identify 1 group leader per group

The group leader is responsible for how to do the activity and must help his/her team.

The group leader starts the activity by **stating a change** that is currently going on within their team or even within the organization and **then toss** the ball to someone else in the circle

The ball must be kept moving.

Activity

Activity - What is Change

The ball must be kept moving (the facilitator can equate this to the implementation of the change within the organization).

Allow the team to develop its own methods/pattern for throwing the ball.

A dropped ball equates to a **resistance** to change or an emotional response to change.

A held ball equates to **uncertainty** in times of change.

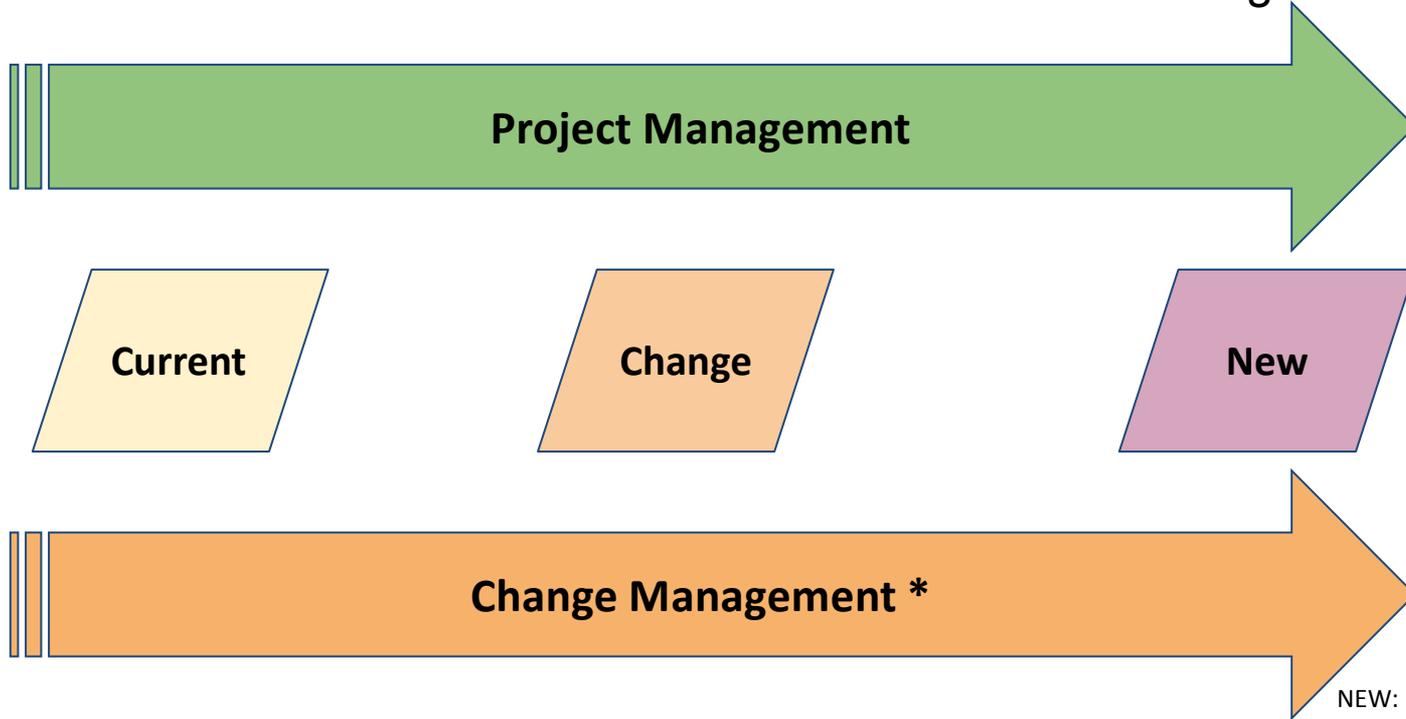
INTRODUCTION TO CHANGE MANAGEMENT – What is Change Management?

Change Management is a set of key steps and processes that when successfully implemented can create and sustain a new culture that improves the performance of the individual, team and entire organization.

When you introduce a change to the organization, you are ultimately going to be impacting one or more of the following:

- Processes
- Systems
- Organization structure
- Job roles

INTRODUCTION TO CHANGE MANAGEMENT – What is Change Management?



- CURRENT:
- processes
 - systems
 - organizational structures or
 - job roles

* Focus on people

- NEW:
- processes
 - systems
 - organizational structures or
 - job roles

INTRODUCTION TO CHANGE MANAGEMENT – What is Change Management?

Discipline	Process	Tools
Project Management	<ul style="list-style-type: none">• Initiating• Planning• Executing• Monitoring and controlling• Closing	<ul style="list-style-type: none">• Statement of work• Project charter• Business case• Work breakdown structure• Budget estimations• Resource allocation• Schedules• Tracking• Risk identification and mitigation• Reports on performance and compliance

From PMBOK® Guide, Third Edition

INTRODUCTION TO CHANGE MANAGEMENT – What is Change Management?

Discipline

**Change
Management**

Process

- Planning for change
- Managing change
- Reinforcing change

Tools

- Individual change model
- Communications
- Sponsorship
- Coaching
- Training
- Resistance management

From Prosci's research-based methodology

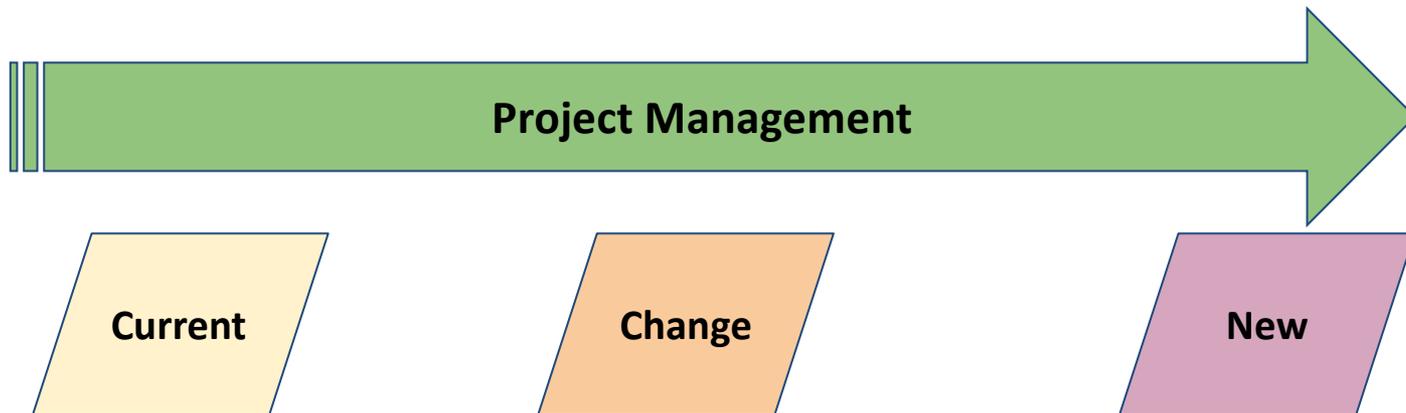
INTRODUCTION TO CHANGE MANAGEMENT - WHAT EACH TEAM IS TRYING TO ACHIEVE

The **project team** outlines the specific activities for defining and prescribing how to move from point A to point B (by changing processes, systems, organizational structures or job roles).

The **change team** outlines the steps needed to help the **individuals** impacted by the change do their jobs in the new way (for example, people transitioning from fulfilling Job Function A to Job Function B as shown below).

Function (A)

Function (B)



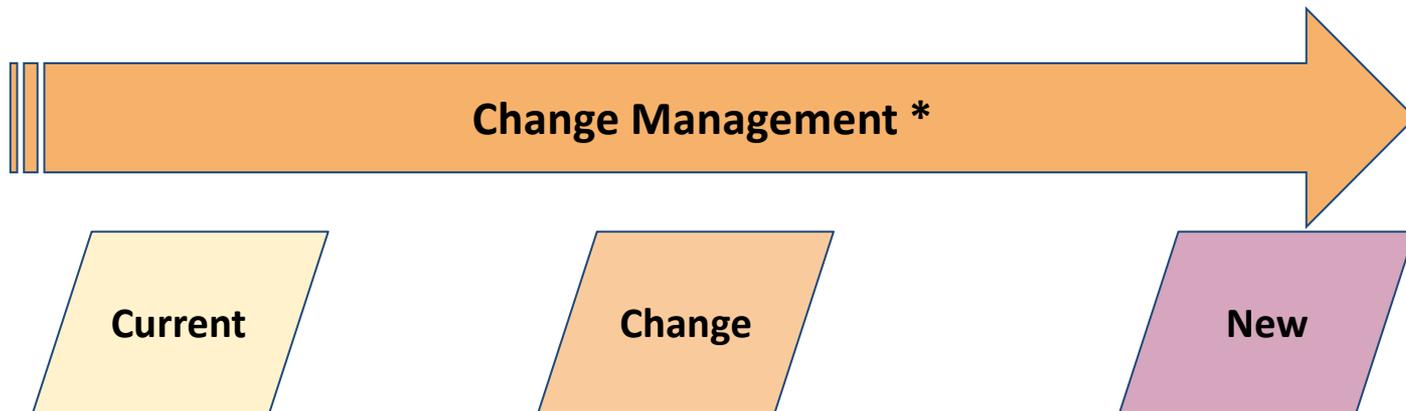
INTRODUCTION TO CHANGE MANAGEMENT - WHAT EACH INDIVIDUAL IS TRYING TO ACHIEVE

The goal of project management is to effectively deploy resources in a structured manner to develop and implement the solution in terms of what needs to be done to processes, systems, organizational structure and job roles.

The goal of **change management** is to help **each individual** impacted by the change to make a successful transition, given what is required by the solution.

Job 1 - Person 1 (a)
Job 1 - Person 2 (a)

Person 1 (b)
Person 2 (b)



INTRODUCTION TO CHANGE MANAGEMENT - SUMMARY

Change Management is a set of key steps and processes that when successfully implemented can create and sustain a new culture that improves the performance of the individual, team and entire organization.

Impacting one or more of the following:

- Processes
- Systems
- Organization structure
- Job roles

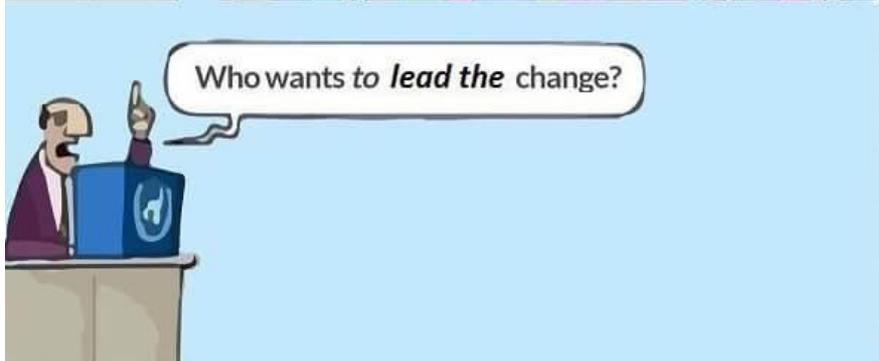
Change management focus on the people and change.

- Process - Planning for change, Managing change, and Reinforcing change
- Tools - Individual change model, Communications, Sponsorship, Coaching, Training, Resistance management



Dealing with
personal change

STRATEGY FOR CHANGE



STRATEGY FOR CHANGE

THE RIGHT AMOUNT OF CHANGE MANAGEMENT AND PROJECT MANAGEMENT

Change management and project management are tools that need to be applied independent of the actual change that you are undertaking.

Anytime you alter *processes, systems, organizational structures or job roles*, you need a structured approach to manage both the technical side and the people side of the pending change.



STRATEGY FOR CHANGE

THE RIGHT AMOUNT OF CHANGE MANAGEMENT AND PROJECT MANAGEMENT

Do project management and change management look the same for every initiative?

- Typically not.

While the right amount of project management and change management is at least some, each of these tools are at their best when they are customized for the unique situation that you are facing.

Your organization, its culture and history, and the specific change that you are implementing all influence the right amount of project management and change management.



STRATEGY FOR CHANGE

How much project management is needed?

The amount of project management depends on the complexity and degree of the change to existing processes, systems, organizational structure and job roles.

How much change management is needed?

Change management engagement depends on the quantity of change(s) created in an individual employees' day-to-day work. It also depends on the organization's attributes, such as culture, value system and history with past changes.



STRATEGY FOR CHANGE

Integrating Change Management And Project Management

While separate as fields of study, on a real project change management and project management are integrated. The steps and activities move in unison as teams work to move from the current state to the desired future state.

Change Management and Project Management Planning Activities

As an example, think about what activities occur during the planning phase of a project between both teams.

Project managers are:

- Identifying the *milestones* and activities that must be completed
- Outlining the *resources* needed and how they will work together
- Defining the *scope* of what will be part of the project and what will not be



STRATEGY FOR CHANGE

Change managers are:

- Crafting ***key messages*** that must be communicated
- Working with ***project sponsors*** to build strong and active coalitions of senior leaders
- Making the ***case of why*** the change is needed to employees throughout the organization, even before the specific details of the solution are complete

The most effective projects integrate these activities into a single project plan.

STRATEGY FOR CHANGE

Defining The Change, Project Management And Change Management

It can be difficult to separate out the change, project management, and change management. In practice, these three components are intertwined in order to deliver a positive outcome to the organization. However, there is value in separating out the components.

Thinking about the three components separately makes it easier to define and help others understand these distinct elements. Separating out these three components is also a solid first step when troubleshooting on a particular project that may not be moving ahead as expected.

STRATEGY FOR CHANGE

Defining The Change, Project Management And Change Management

For instance, where are our challenges coming from:

- **The design of the change? (change)**
- **The technical steps, activities or resources (project management)?**
- **How individuals are accepting or resisting the change (change management)?**

Think about what each component is trying to achieve (see the table below) and use this to describe change management in context of the change and project management.

STRATEGY FOR CHANGE

Element:

Goal or objective:

The change

To improve the organization in some fashion, such as reducing costs, improving revenues, solving problems, seizing opportunities, aligning work and strategy or streamlining information flow within the organization

Project management

To develop a set of specific plans and actions to achieve "the change" given time, cost and scope constraints and to utilize resources effectively (managing the technical side of the change)

Change management

To apply a systematic approach for helping the individuals impacted by "the change" be successful by building support, addressing resistance and developing the required knowledge and ability to implement the change (managing the people side of the change)

STRATEGY FOR CHANGE - SUMMARY

Anytime you alter *processes, systems, organizational structures or job roles*, you need a structured approach to manage both the technical side and the people side of the pending change.

How much change management is needed?

Change management engagement depends on the quantity of change(s) created in an individual employees' day-to-day work. It also depends on the organization's attributes, such as culture, value system and history with past changes.

For instance, are our challenges coming from:

- **The design of the change? (change)**
- **The technical steps, activities or resources (project management)?**
- **How individuals are accepting or resisting the change (change management)?**

All fixed set patterns
are incapable of
adaptability or pliability.
The truth is outside of
all fixed patterns. --
Bruce Lee



**“I want you to find a bold and innovative way to do
everything exactly the same way it’s been done for 25 years.”**

TECHNICAL SIDE OF CHANGE

Where can you start the change process?

1. Create a shared vision of what the change means.
2. Foster understanding, engagement, collaboration and commitment amongst the project stakeholders.
3. Identify the changes that will be experienced by groups and individuals.
4. Ensure stakeholder change related needs are identified and addressed appropriately based on impact.
5. Facilitate a smooth transition by enhancing stakeholder preparedness for the change(s).



TECHNICAL SIDE OF CHANGE - Change Management Streams

Stakeholders

- Identify
- Categorize
- Assess needs
- Manage
- Facilitate
- Respond

Communication

- Define phases
- Assess audience
- Assess change impact
- Create communication products
- Select methods
- Roll out

Training

- Identify needs
- Assess change impact
- Create Learning Supports
- Select delivery
- Deliver

Documentation

- Update Documentation
- Define Scope
- Validate current state
- Identify changes
- Implement changes
- Roll out

Usability Testing

- Compare Current to New state
- Assess impact
- Conduct user sessions
- Roll-out findings

TECHNICAL SIDE OF CHANGE

Handout - Organizational Change Map Change Management Projects.xlsx



Org Change Map

Handout - Stakeholder Analysis and Management Plan Template Guidelines.docx



Stakeholder
Analysis

Handout - Communications Planning Template – Instructions.docx



Communication
Planning Template Inst

Handout - Communications Planning Template.docx



Communication
Planning Template

Handout - Prosci-Training-assessment.docx



Prosci Training
Assessment

PEOPLE SIDE OF CHANGE



Dilbert.com DilbertCartoonist@gmail.com



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PEOPLE SIDE OF CHANGE

- According to Robert J Kriegel, an authority on change management and author of *'Sacred Cows Make the Best Burgers: Developing Change-Ready People and Organizations'*, change readiness is a learnable skill set.
- He has identified 7 principal traits of change readiness

ACTIVITY

- We will take 10 minutes to complete the Change Readiness Assessment and then score ourselves on page 3.

PEOPLE SIDE OF CHANGE - Activity

- Activity - 7 Traits of Change Readiness.docx



7 Traits of Change
Readiness

Handout - Manager Change Readiness Self-Assessment.docx



Manager
Readiness SA

Handout - The Five Dysfunctions of a Team Assessment.docx



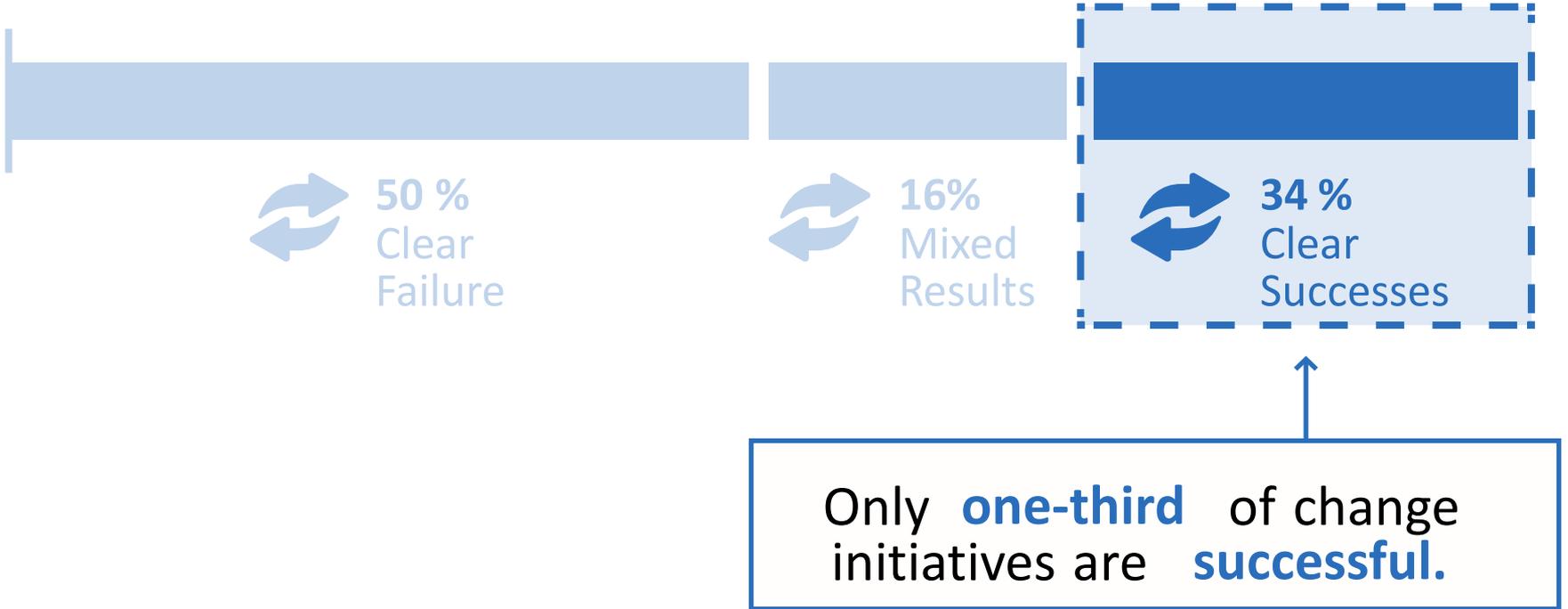
5 Dysfunctions of
Team SA

Team Effectiveness Checklist.docx



Team
Effectiveness Checkli

PEOPLE SIDE OF CHANGE



n = 413 changes.

Source: CEB HR Change Readiness Survey.

PEOPLE SIDE OF CHANGE

Making Change Management Work

- Think of a change your organization is undergoing now.
- Consider how employees resist the change.
- What does your organization do to address employee resistance?
- Remember how your organization responds to resistance.

PEOPLE SIDE OF CHANGE

Remember that resistance to change is natural; managers and staff alike go through the following four stages of transition in response to change (although the intensity and duration of transition will vary among individuals):

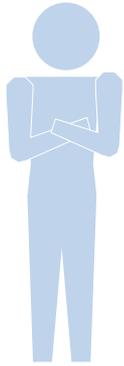
Denial — minimizing, ignoring, carrying on as before

Resistance — anger, fear, anxiety, withdrawal, confusion, sadness

Exploration — energized but unfocused, enthusiasm

Commitment — making decisions, taking action, clarity, follow-through



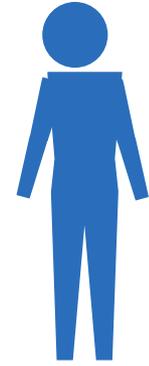


DENY/IGNORE

How good things were in the past
They don't really mean it
It can't happen here
Numbness
Everything-as-usual attitude
Minimizing
Refusing to hear new information

COMMIT

Where am I headed?
Focus
Teamwork
Vision
Cooperation
Balance



Anger
Loss and hurt
Stubbornness
Blaming others
Complaining
Getting sick
Doubting your ability

RESIST/REACT

What's going to happen to me?
Seeing possibilities.
Chaos
Indecisiveness
Unfocused work
Energy
Clarifying goals
Seeing resources
Exploring alternatives
Learning new skills

ANTICIPATE/EXPLORE

PEOPLE SIDE OF CHANGE

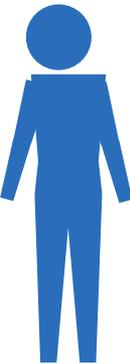
People have different needs when they are in the different stages of transition.

People in **denial** need compelling evidence to help them focus on reality.

People in **resistance** (most people) need a safe climate to express themselves and need to know that they have been heard. They also have a need for more specifics and information relevant to them.

People in **exploration** need involvement, action and results.

People in **commitment** need very little other than positive reinforcement.



PEOPLE SIDE OF CHANGE

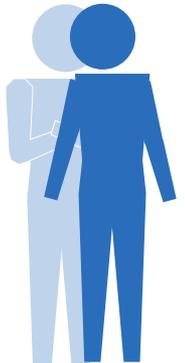
Actively try to identify which stages your staff members are in and consider what they need and don't need when they are in each stage of transition.

Ask yourself, "How can I help this employee to move through the Transition Curve based on where he or she is right now?"

If you provide support for the various stages of transition, you will find that most staff members will self-select what they need, even if you are not sure what stage of transition they are in.

Pay most attention to the "people" issues.

Research clearly shows that it is the "people" issues that predict change success or failure. Since people are the ones who implement change, they must understand and be committed to that change.



PEOPLE SIDE OF CHANGE

What are the major risks to the change being sustained over time?

Potential Resistance / Risks

Likelihood of Resistance

1 = Very Unlikely, 2 = Somewhat Unlikely, 3 = Neutral, 4 = Likely, 5 = Highly Likely

Executing the change without being fully “on board” or engaged

Changing initially but then reverting to the “old way”

Refusing to participate in subtle ways

Withholding information

Undermining the credibility of those leading the change

Fostering political games

PEOPLE SIDE OF CHANGE - SUMMARY

Remember that resistance to change is natural; managers and staff alike go through the following four stages of transition in response to change (although the intensity and duration of transition will vary among individuals):

Denial — Resistance — Exploration — Commitment

Actively try to identify which stages your staff members are in and consider what they need and don't need when they are in each stage of transition.

Ask yourself, "How can I help this employee to move through the Transition Curve based on where he or she is right now?"

MEASURING CHANGE FOR SUCCESS



MEASURING CHANGE FOR SUCCESS

In the Prosci Best Practices in Change Management Report – 2014 Edition, participants shared if and how they were *measuring and reporting* on change management effectiveness, these findings will give you plenty to consider.

To gather insight on change management measurement and metrics, they asked the following questions:

- "Did you measure the effectiveness of your change management effort in support of the project?"
- "Did you measure whether the change was occurring at the individual level?"
- "Did you have to report on change management effectiveness of the project?"
- "How did you demonstrate the value-add of applying change management on the project?"
- "How did you measure the overall outcome of applying change management?"

MEASURING CHANGE FOR SUCCESS

Changes in organizations are undertaken to **improve performance**. Some of that improvement comes from just installing the solution. However, much of the benefit and expected improvement is tied to people changing how they do their jobs.

In the Prosci CMROI Model, that is the “**adoption contribution**” of the project: the percentage of a project benefits that depend on people changing how they do their jobs.

For important projects, that number is commonly in the 80% to 100% range.

Change management focuses on helping people change how they do their jobs, allowing us to capture the adoption contribution and the people-dependent portion of project ROI.

MEASURING CHANGE FOR SUCCESS

- All too often, organizational changes meet requirements without delivering expected results. They deliver the necessary outputs without delivering on expected outcomes. The focus of the change effort is on the solution rather than the benefits of the solution.
- The gap that exists between requirements and results, between outputs and outcomes, between solutions and benefits is the people who bring the change to life in their day-to-day work.
- Change management enables the closing of this gap by effectively supporting and equipping those people impacted by a change to be successful in bringing it to life in how they work.

MEASURING CHANGE FOR SUCCESS

As we begin to rethink and reposition the ROI of change management by making the direct connection to project results, we must make a shift in conversation:

- Away from “What is the ROI of change management?”
- Toward “What amount of the project benefits (ROI) depends on employee adoption and usage?”
- The ROI of change management is the additional value created by a project due to employee adoption and usage.

MEASURING CHANGE FOR SUCCESS

- Handout - Change Management ROI Guide.docx



Change
Management ROI

- Measuring Change for Success.docx



Measuring
Change for Success

MEASURING CHANGE FOR SUCCESS - SUMMARY

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Q&A

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