A consolidation of thought pieces on the subject

Points of Interest

- *The first article defines the term "change management" and looks at the necessary skills that are required to manage change in organizations.*

- *Now that we know what skills are required, the second article addresses how we can build an internal change capability for our organization.*

- *The following article looks at practical ways in which to implement change in our organizations specifically focusing on the leader's role.*

- *The last article focuses on the roles and responsibilities of people involved in a change process.*

- *Finally, we put it all into practice and spend some time planning our next steps.*

Inside this guide...

CHANGE MANAGEMENT FUNDAMENTALS (EXTRACT)

BY CORPORATE EXECUTIVE

"CHANGE MANAGEMENT": DEFINING A BUZZWORD

"Change management" is a term that is increasingly used in today's organizations as a catch-all for anything having to do with organizational change. Change management has different meanings for different companies and experts, as evidenced by the various definitions below. Despite differing points of view for defining change management, all organizations must begin with a change problem.

Change management is the continuous process of aligning an organization with its marketplace—and doing so more responsively and effectively than competitors.

-Lisa M. Kudray and Brian H. Kleiner, "Global Trends in Managing Change," Industrial Management, May 1997.

In thinking about what is meant by "change management," at least four basic definitions come to mind:
- The task of managing change
- An area of professional practice
- A body of knowledge
- A control mechanism

-Fred Nickols, "Change Management 101: A Primer," Distance Consulting, 2006.

Change management is the formal process for organizational change, including a systematic approach and application of knowledge. Change management means defining and adopting corporate strategies, structures, procedures, and technologies to deal with change stemming from internal and external conditions.
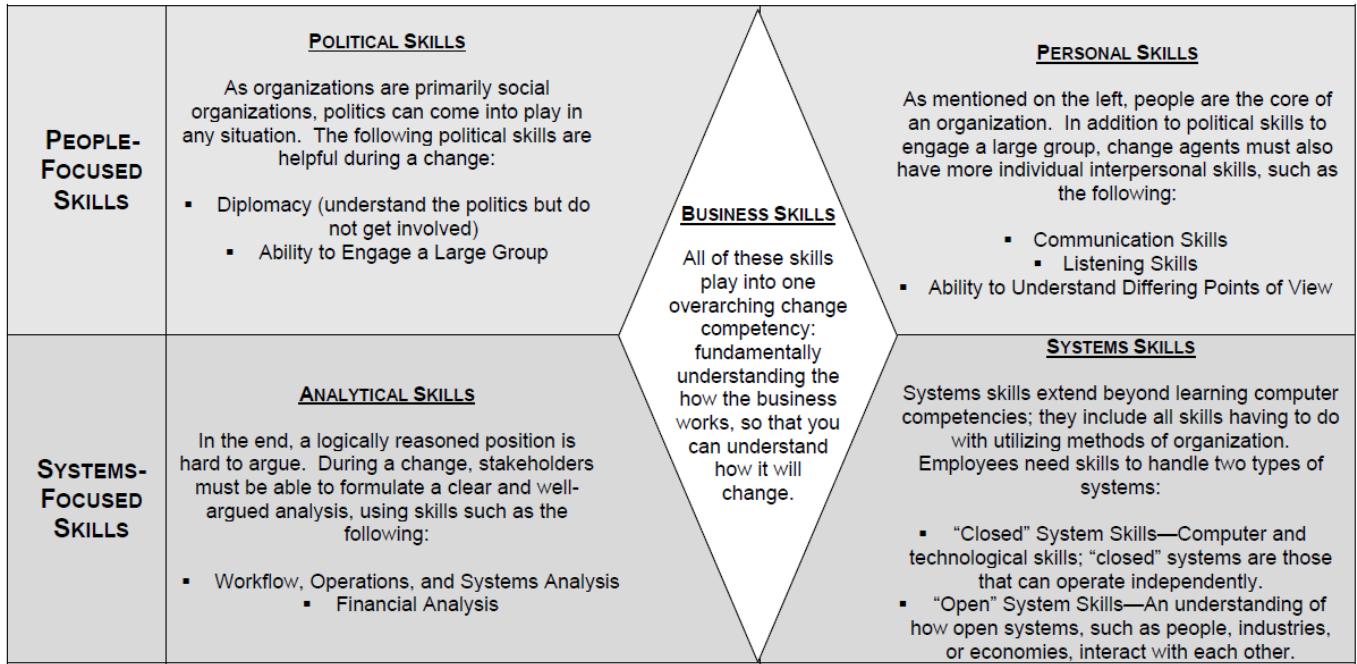
-Society for Human Resource Management, 2007 Change Management Survey Report

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Change management is a critical part of any project that leads, manages, and enables people to accept new processes, technologies, systems structures, and values. It is the set of activities that helps people transition from their present way of working to the desired way of working.

-Lambeth Change Management Team, Change Management Toolkit

SKILLS NECESSARY TO MANAGE CHANGE

Change management requires a combination of people-focused and systems-focused competencies that play a part in overall business-focused skills. Depending on the change initiative, different competencies will play stronger roles, but both people- and systems focused skills are always necessary to manage and gain commitment to change. The following model demon-

	POLITICAL SKILLS		**PERSONAL SKILLS**
PEOPLE-FOCUSED SKILLS	As organizations are primarily social organizations, politics can come into play in any situation. The following political skills are helpful during a change: • Diplomacy (understand the politics but do not get involved) • Ability to Engage a Large Group	**BUSINESS SKILLS** All of these skills play into one overarching change competency: fundamentally understanding the how the business works, so that you can understand how it will change.	As mentioned on the left, people are the core of an organization. In addition to political skills to engage a large group, change agents must also have more individual interpersonal skills, such as the following: • Communication Skills • Listening Skills • Ability to Understand Differing Points of View
SYSTEMS-FOCUSED SKILLS	**ANALYTICAL SKILLS** In the end, a logically reasoned position is hard to argue. During a change, stakeholders must be able to formulate a clear and well-argued analysis, using skills such as the following: • Workflow, Operations, and Systems Analysis • Financial Analysis		**SYSTEMS SKILLS** Systems skills extend beyond learning computer competencies; they include all skills having to do with utilizing methods of organization. Employees need skills to handle two types of systems: • "Closed" System Skills—Computer and technological skills; "closed" systems are those that can operate independently. • "Open" System Skills—An understanding of how open systems, such as people, industries, or economies, interact with each other.

RIDING THE WAVES OF CHANGE: BUILDING AN INTERNAL CHANGE CAPABILITY

BY DELOITTE

Leading organisations periodically make large investments in keeping their business model relevant. Almost all of these investments result in some change or another. *Unfortunately, organisations do not always extract value from these changes because they lack a consistent, sustainable change capability built within their organisation.*

Whether due to globalisation, new technologies, regulatory factors, increased competition, changing consumer profiles or a host of other factors, organisations will typically have waves of change initiatives to drive new operating models, technology implementation, customer service, cost reduction and process improvement.

Sadly, changes are often poorly integrated or simply falter before proper attention has been paid to sustaining behaviour change. This is often due to the fact that a typical employee faces an overflow of change and communications campaigns, events and messaging on a daily basis, and this rapidly changing work landscape is not holistically considered. Going beyond ad hoc or project-based change management to building a consistent internal change language and capability in an organisation can be a significant factor in enhancing the success of change initiatives, and ultimately enabling an organisation to "out-change" competitors. This means building the capability of leaders to lead change, project managers to manage change, change practitioners to plan and implement change, line managers to guide people along a change journey and individuals to adapt to and grow through change.

Five key factors to building institutional change capability:

1. Create the "swell" to enable a consistent, cohesive change story and case for change.

What's our purpose, our ideal and vision that guides all of our transformation initiatives? And why must we move from where we are today? This should guide and infuse the messaging for all change initiatives.

2. Create an integrated change journey, a single view of changes across the organisation. A leading consumer services firm has introduced the concept of waves of change. This meant that by understanding the drivers of various change initiatives in the business and when they were taking place, they could prevent a "tsunami" of change initiatives taking place at one particular time, but instead plan and schedule constant, predictable and manageable waves of change within the business. The result - a stronger adoption rate and less change fatigue among employees. Deloitte has found this to be a powerful tool to create stakeholder-based change calendars; for a particular

role or workforce segment, and understand what the sequence of change projects and events over the next year is.

3. Create a common lingo, a language and framework to guide change efforts across the organisation. Time is wasted and confusion created over discussions of definitions and completion of templates; it is much more important to actually relevantly connect with the stakeholder than waste precious time arguing semantics about whether to use a stakeholder map versus a stakeholder matrix. Translate this into a useable outcomes-based toolkit with standard processes, templates, tools and tips underpinning each element of your change framework.

4. Create a dedicated change governance and delivery focus in the organisation. This can be resource light and supplemented if required by variable resourcing, but enables a single point of ownership for change management practices across the organisation. Despite having the Change Framework, no change project is ever the same.

Hold meetings or communities of practice where practitioners can share success stories, offer advice and ideas.

5. Clarify roles and responsibilities for successful change and build capability to effect these roles. Executive sponsors, change practitioners, line managers and staff all need to know their role in a successful transformation. These will range from technical for example (defining change impacts, to behavioural (for example, inspiring, engaging and influencing) skills and capabilities.

CHANGING WAYS: A PRACTICAL TOOL FOR IMPLEMENTING CHANGE WITHIN ORGANISATIONS

BY MURRAY M. DALZIEL AND STEPHAN C. SCHOONOVER

Change suits the change makers, not necessarily the people who have to live with them. Change can be defined as a planned or unplanned response of an organization to pressure. Change may result from the outside environment in the form of new competition, new social values, or new business practices. In all it s forms, change creates opportunities and vulnerabilities. Change is an attitude, a state of mind, a stance. But the stance of some leaders can cause unexpected trouble during the change efforts.

Three specific stances can result in problems - visionary, technocratic and sympathetic:

Visionary Leaders: view change a necessary process that emanates from sweeping cultural shifts. They frequently make global announcements that stimulate action before a thorough consideration of eventual consequences. Visions need structure.

Technocratic Leaders: Focus exclusively on outcomes without consideration of employee concerns. "People resist anyway - your only recourse is to push change through aggressively." They build short term gains - unforeseen pitfalls and long term resentment.

Sympathetic Leaders: Too much attention to people and how they feel about change. Freezes momentum. After a time employees beg for leaders.

In today's environment, organisational change is universal, pervasive, and necessary. However, the attitudes and practices of individual leaders determine whether or not change is productive or destructive. The attitude of the best performers is, "I know we need to change, but I know it's not magic, or inspirational. It's completing many, many undramatic small steps successfully."

Effective change leaders deal with the tangible and hidden processes of change by answering *3 key questions about*

the change effort:

1. **Have we got our organization _ready_ for planned change**

2. **Do we have the _right mix of skills_ on our team to make the change happen?**

3. **Can we ensure that the _implementation process_ will be successful?**

The 3 key questions also encompass the natural time span required for a change project. First, change leaders have to prepare their organisation for change. Next, they have to ensure that they have the right people working with them. And finally, as they pass from the idea stage, through development, toward implementation, they must follow an action plan that ensures their organization can embrace and absorb the change.

There are 5 attributes or organizational readiness:

⇒ History of Change

⇒ Clarity of Expectations: The degree to which the expected results of change are shared across various levels of the organization

⇒ Owning of the Idea or Problem: The degree to which those most affected by the change initiate the idea or problem the change solves

⇒ Support of Top Management

⇒ Compatibility with Organizational Goals: The degree to which the proposed change corresponds to past and present organizational practices and plans.

The first 3 dimensions focus on how to motivate people to embrace change. To stimulate a positive attitude toward change, change leaders let "success breed success", by scaling initial interventions to their organization's past performance. As one change leader aptly stated, "The most important thing is not to fail at the start. You should always

ensure an initial success - even if you have to move more slowly or only start a small part of the change". In addition, change leaders share information with those most affected by change to instil consistent expectations about the change and its ramifications through-out the organization. Finally, they make sure that the change is framed to meet key problems of those who will have to live with the change first.

Support of top management
In the most effective change projects, top management actively participated in solving problems throughout the life span of the process. Choosing the right people for the implementation team in another critical aspect of the change process. In all cases of successful teams, the teams covered the functions of the following 6 roles:

1. Inventor: integrates trends and data into concepts, models, and plans: envisions the "big picture"

2. Entrepreneur: instinctively focuses on organizational efficiency and effectiveness: identifies critical issues and new possibilities; actively seeks advantages and opportunities

3. Integrator: Forges alliances, gains personal acceptance, as well as acceptance of team and their program: relates practical plans to strategic plans and organizational issues

4. Expert: takes responsibility for the technical knowledge and skills required for the change: uses information skilfully and explains it in a logical way

5. Manager: Simplifies, delegates, assigns priorities; develops others; gets the job done at all costs

6. Sponsors: Ensures support and resources from the highest levels of the organization; communicates where change fits in the overall organizational vision.

Change leaders understand which role or roles they can perform competently

and how to select others for the remaining roles. Beyond building a team with the potential to fulfil the six roles, change leaders ensure that the roles operate throughout the change process.

Implementation Stage of planned change ensures that goals are completed. These are the critical factors:

1. Clarifying Plans: is the process in which implementors define, document and specify the change

2. Integrating New Practices is the process in which an organization incorporates change into its operations

3. Providing Education: includes those programs in which end users learn about and use new processes and procedures

4. Fostering Ownership is the process which end users come to identify new processes and procedures as their own, rather than regarding them as changes imposed upon them

5. Giving Feedback is the process in which a detailed objective is monitored and used to judge the effectiveness of the implementation plan.

What Change Leaders Do
Effective leaders ensure that possibilities become realities. Change leadership is the process of seeing beyond the change goal for hidden barriers and unpredicted consequences of change. Most often, the critical barriers are not technical knowledge or skill. Rather, they are simple oversights, lack of persistence, poor communication, or other more personal vulnerabilities. The ability to overcome the human and organizational barriers to change is the key to innovation. Change leaders do this through their ongoing involvement and monitoring of the process. Most importantly, they understand that change is a dynamic, evolving set of events that must be managed in a

manner similar to other parts of the business.

The most important steps for executing large-scale changes is to make them smaller. Change leaders answer specific organisational needs through specific personal behaviours that can be planned and mastered. *Perhaps the most essential task of the change leader in motivating and influencing others is perfecting communication.*

Management experts have long extolled the virtues of clear communication. In fact, it was Aristotle who first explored this idea: *"Once man understands an idea, he can identify with it, acknowledge it, and make it his own"* The most effective leaders recognise that the objectives for change must be clearly communicated before the team can own them. Change leaders also understand that communication requires excellent information.

Throughout the change process effective leaders focus on developing skills of written communication, meeting management and presentations. Change leaders help end users visualise specific plan steps and emphasise how users can improve their own work procedures as well as achieve their personal goals. Change leaders know the importance of creating written, visible plans.

"Change leadership is the process of seeing beyond the change goal for hidden barriers and unpredicted consequences of change."

ROLES AND RESPONSIBILITIES FOR CHANGE

BY RYERSON UNIVERSITY

Understanding the roles and responsibilities that you and others play in the change effort is essential. They will provide clarity on the expectations, project scope and responsibility for each contributor. Typically, there are four key roles: the Sponsor (Senior Leaders), Champion (Leader), Change Agent (Human Resources) and Stakeholder (Employees).

The Sponsor:
• Has the overall responsibility for the department or business unit
• Is the person who has authority over the project and over the individuals who will implement the change
• Provides funding, resolves issues and scope changes
• Approves major deliverables and provides high-level direction
• Has a clear vision, identified goals and measurable outcomes for the change initiative

The Champion:
• Has the overall day-to-day authority
• Provides the Sponsor with information about the issues and challenges
• Engages and involves the right people on the ground
• Brings the change vision to life
• Encourages (and sometimes enforces) new and desired behaviours

The Change Agent:
• Advise and guide the Champion and Sponsor throughout the change initiative
• Focus on assisting, advising and coaching the Sponsor and Champion in the change effort
• May act in a number of roles – data gatherer, educator, advisor, facilitator or coach
• Has no direct-line authority to or over the Sponsor or Stakeholders
• Act as subject-matter-experts in the change management process

Stakeholders are those employees who will be impacted by the change. It is critical that they are involved in the process and understand how the change initiative will impact their current state.

Dilbert

Putting it into practice….

Before beginning any change project, consider the following questions to help you gauge your preparedness for the initiative:

Understanding the Change
⇒ Do I know the changes, their impact, and benefits?
⇒ Could I explain them to anyone I work with?

Communicating Urgency
⇒ How can I communicate the need for change, the first steps, how people will be supported, and when we have achieved quick wins?

Integration
⇒ Are there other parallel projects that will have an impact on the changes I'm managing?
⇒ Will the changes impact the same groups?
⇒ Can we combine forces and integrate plans and communication?

Capacity to Change
⇒ What changes will happen and when?
⇒ Can I stagger the impact or combine them sensibly to lessen the impact?

Leadership Alignment
⇒ Do change leaders know their responsibilities and the commitment expectations?

Trust and Experience
⇒ Has change successfully occurred in these groups in the past?
⇒ Can we learn from what did or did not work well?
⇒ What level of trust exists between groups and how can this be improved?

Communication
⇒ When is communication necessary?
⇒ How can I make the messages clear, interesting, and engaging?

WHICH SKILL DO I WANT TO DEVELOP THAT WILL ENABLE ME TO BE A CHANGE LEADER?

WHAT ARE THE NEXT THREE STEPS I NEED TO TAKE ALONG THE PATH TOWARDS LEADING OR MANAGING CHANGE BETTER?

THE FIRST STEP I WILL TAKE TODAY TOWARD MY GOAL IS…

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