

## **Implementing change successfully** – My top 10 practical tips

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For many years on projects I didn't use the term "change management" or "organisational change management" to describe any project activities. I found that language to be a major barrier to acceptance of the types of activities required on a project to transition to a new way of doing things.

I have always found that the need for communication and training was well accepted, but in practice, these alone will not result in the impacted staff being motivated to change or well prepared to do their day to day activities efficiently and effectively in the new way. Most people understand and accept that getting people to change is very difficult, and usually is the fundamental difference between project success and project failure. Many projects write theoretical papers, strategies and approaches, but skim over the practical activities that could really help impacted staff.

So how do I get around the barriers where people bristle at the term "change management" and want to cut those costs from the project? I use terms like "business preparation" and "business readiness", as project managers, sponsors and executives accept these as critical elements of a project. Those who think that change management is a "nice to have" but a waste of money and just all too much "fluff" can accept that the business needs to prepare for the new way of operating.

### **Practical learnings and tips**

For the well-accepted methods, frameworks, theories and other practical tips, I recommend you read some of the many books and web sites on the subject of organisational change management. Following are my practical observations and learnings about what will help get a lot more people to come across to the new way – it is a "fluff-free" zone.

The context for all these tips is that most organisations have so much going on – everyone is busy and asked to do more with less. If you want staff to take the time and effort to do something new, they will need some convincing. Here are my top 10 tips, and on the following pages I expand on each:

1. What's in it for me? – The only question you really need to have an answer for
2. Detailed impact analysis is critical – "Take a walk in the shoes" of every stakeholder group
3. Tools, reference documents, translation tables and support models make the transition easier
4. Timing is everything when it comes to communicating
5. Sponsorship from the top that is vocal and visible is the difference between success and failure
6. Having respected internal staff on the project team generates trust and acceptance
7. It's not what you do, but *how* you do it that makes all the difference
8. Champions embedded in each impacted area provide a bridge from the project to operations
9. Training in advance creates awareness not confident capability – you need to do more
10. Internal teams, eg HR and communications, add the most value when retained in their roles

A bit more about what I mean:

## 1. What's in it for me? – The only question you really need to have an answer for

Human nature is that when we're comfortable, we're not really going to want to move. So you have to convince impacted staff that they can be better off in the new world – on a personal level. Yes they care about what is good for the organisation, but that won't make it worth the effort to leave their comfort zone. *Projects need to be great marketers and they need to get personal with their pitch if they want to motivate anyone to change.*

## 2. Detailed impact analysis is critical – "take a walk in the shoes" of every stakeholder group

The only way to answer the question "what's in it for me?" and therefore have a "pitch" to convince your stakeholders to change, and to address their points of resistance, is to do your research. I find it quite easy to *"put myself in another person's shoes" and see the world from their perspective*, but my strongest observation is that most people can't do that effectively – it doesn't come naturally. I believe it is the single most important skill for any project leader and project team member to have.

A quality impact analysis starts with a simple stakeholder identification process – list all the groups and the nature of their relationships or conceptual impacts, and remember to include external stakeholders, governance groups, related parties, political influencers etc. Then throughout the project, each time more information progressively comes to light, run down that list and note the impacts on each group or more clarity about the impacts as you go. Also add the resistance being presented or likely to be presented by each group – what their argument is or will be, and get your answers ready or tailor your "pitch" to pre-empt and/or prevent the resistance statements.

## 3. Tools, reference documents, translation tables and support models make the transition easier

Your detailed impact analysis provides the foundation for providing tools and support that will make the transition or the new process easier for each stakeholder group.

When it comes to the final push to take action or take new processes or systems live, you need a "key changes" summary for each major group. This should be a tailored summary of what will change, why this group should support the change, the actions for them to take, and the help and support available to make the transition smoother.

For each impact, you need to consider *"how can we make life easier for this group to understand the new way?"* Examples are to prepare reference materials, for example, that translate old system codes to new system codes, or a "day 1 getting started" sheet listing the steps to take to start the new service delivery process. If an organisation still has manual forms in a process, it would help to redesign manual forms – the order in which data is completed on a paper form should match the data entry order for a system, or process flow for service action. The list of tools and actions is specific to each change, each project, each stakeholder group and each organisation.

Support material is critical – succinct instructions on how to do relevant tasks, where to find information, expert contacts, links to handy web pages etc. Having roving support staff who have been heavily involved in the project or specifically trained for support roles "walking the floor" in the first week staff are providing a new service or using a new system is a great confidence booster.

#### 4. Timing is everything when it comes to communicating

Wise advice has always been to communicate, communicate some more and when you think you've communicated enough, to communicate again. A wide variety of communication methods and channels is also important. I subscribe to all of that.

What has become very clear to me though is that *people only take notice of communications when there is an actual impact on them*. So telling staff that in 3 months they need to take some action is usually a waste of effort. Yes there needs to be early awareness, but know that they will forget. My advice is to break down the communications into stages where there is a real purpose and impact on staff – get them to *do* something as a result of each communication and make sure it is within a couple of weeks.

Sponsorship messages are important to come from executives. Action messages should come from direct managers and/or from peers. Informal channels work – get people talking.

#### 5. Sponsorship from the top that is vocal and visible is the difference between success and failure

Only those things that are seen as business critical and/or personally beneficial will be actioned. Sometimes it is hard to “pitch” a personal benefit that is strong enough to motivate people to move out of their comfort zone, so strong executive sponsorship about the importance of the change is critical. When the top level executives keep talking about a change or a project and reinforce how important it is to them, more notice is gradually taken by staff.

Ignoring a change sponsored from the top should be a “career limiting move”. Most people will take some motivation from that. *If an executive truly believes in the criticality of the change, they will drive the change* and address resistance, and as a result, the change will happen. Where very senior, very active sponsorship and visible commitment is missing, the change will either not happen in full, or the old ways will quickly return once the project closes.

#### 6. Having respected internal staff on the project team generates trust and acceptance

I find that staff will trust a new process or solution when the design has been contributed to by “one of their own” for whom they have respect. They will be more likely to adopt the change, more likely to speak positively about it and motivate others to adopt the change, and more likely to ask for help when needed, if they believe in the team.

*It is important that organisations put their best people on project teams* – it is a wise investment. Not only does it generate trust, but it also means that a deep knowledge of the new service, process or solution is retained in the organisation by people most likely to provide coaching and ongoing sponsorship, enabling continuous improvement. No new service, process or solution is ever perfect at implementation. Having good people embedded in the project means they were there when key assessments were made and decisions were taken and they know why choices were made at the time. This insight is critical to continuous improvement and preventing wasted effort in future.

## **7. It's not what you do, but *how you do it* that makes all the difference**

In project management, planning involves listing out a set of tasks to be undertaken – a list of “what to do”. For me change management is effectively the “how we will do it” element of the project. If you think about the options for how to do every task, and at the appropriate points take an approach that involves and includes representatives of impacted stakeholders, you are effectively embedding change management principles into every element of your project. Of course it is about balance – you should consider your options at each point, and there are times to consult and times to be decisive so things keep moving forward in a timely manner.

The more you involve impacted stakeholders in the journey, the more likely they are to adopt the change. *How you go about designing, creating and implementing the service or solution can have a big impact on the extent to which the changes are adopted.*

## **8. Champions embedded in each impacted area provide a bridge from the project to operations**

I believe that all projects that will have a broad impact should try to adopt a network of champions embedded in major impacted areas and/or sites as a key part of the change approach. A two way communication channel between the project team and the network of champions is a valuable way to generate understanding across all parties.

*A network of local champions should be a trusted group with whom the project team can discuss ideas, early designs, approaches for communicating locally and implementation logistics.* Champions become early adopters and local experts, which provides career benefits in return for the extra workload they take on. Their knowledge of local staff with key expertise and information, how to effectively engage locally, and key executive and specialist forums is valuable. They are also known to local stakeholders, so are far more likely to be trusted than an “unknown” project team.

## **9. Training in advance creates awareness not confident capability – you need to do more**

There is much to be read about the 70:20:10 learning framework, being the theory that in the context of learning, 70% is gained through experiential learning (on the job); 20% through social learning (coaching) and 10% through formal learning (courses). Those organisations implementing change and relying on formal training sessions to build staff competence to do the new process or provide the new service should consider this theory. Formal training is very valuable and must be factored into preparations to go live with any new solution or service. Most of it will be forgotten though before day one arrives. Staff will retain general awareness and some familiarity when starting out.

For common tasks and processes, eLearning is an excellent complementary investment. Staff can do the training at their own pace, when they want, as often as they want (including as a refresher after you go live and for any new starters who come along in the months and years to come). Transitional support through experts “walking the floor” to provide coaching and help in the first few weeks is very useful. More value is gained by embedding support within new processes. For new systems, embedded and contextualised help functions to troubleshoot quickly from within the screen is worth investing in. Think creatively about ongoing support relevant to each service change. The solutions are specific to each change, each project, each stakeholder group and each organisation, but on the job support is an important element to supplement your training investment.

**10. Internal teams, eg HR and communications, add the most value when retained in their roles**

My advice is to know the operational strengths of HR and communications teams, leave them in their operational roles, and make very good use of their strengths and advice at key project points.

Project based changes can be extensive, very fast moving and constantly evolving as more and more information comes to light. Project environments are very different to general operational activity. *Many people are great operators in their day to day roles, but are just not suited to a project environment.* This applies for technical subject matter experts, HR staff and communications staff. They are most valuable to the organisation and the project if left in their operational environment, used as a source of expertise for advice, and assist with specialist tasks as needed, rather than embedded in a project.

**Communications** – I prefer to have project team members with strong project change experience develop communication plans using their knowledge of the nature of the change in the specific project, experience in what timing and types of communications contribute to motivating people to change and provide the right information to enable their change. This is different to normal communication needs. Given that things generally need to happen faster on projects than in normal operations, I also find it more effective for project team members to generate the content for communications and publications with their subject matter knowledge. I like to edit that material myself to ensure “punchy” messages come through clearly and in the right tone with political sensitivities considered. The project sponsor often provides excellent review sense for the acceptability and fit of communications in the broader context.

*Where operational communications teams provide excellent value is in advising about the communication channels and methods to use and what has worked in the past, and about who are the key influencing groups, existing forums, web sites and regular distributions that can be used. They can open the doors to get content published through those forums and onto agendas for presentations. They also provide value in editing materials for broad distribution and checking compliance with corporate identity standards. Operational communications experts don't need to be within the project to provide this value.*

**Human Resources** – I find that some members of HR teams have an interest in organisational change management and organisations like to move them into a project role to lead change management. Project based change implementation is very different to general organisational culture and change, and regardless of interest, a lack of experience in implementation project based organisational change management represents a large gap. *Professionals with change management experience in an implementation project environment are critical and are of most value when partnered with an operational based HR team* which has strong knowledge of the organisational culture, key players, forums and groups of influence, and what has worked well in the past. By moving a HR team member onto a project to lead project change, you end up with only half the expertise required, and worse still, you dilute their true expertise and ability to objectively challenge and advise the project.

My advice is to use implementation project change management experts to develop and lead the embedding of change management fundamentals into all project activities, and have them link with the operational HR teams for advice at key points and to open doors to relevant forums and influence groups in partnership with the project. Use HR teams for specialist HR activities also.