CHANGE MANAGEMENT AND
THE PROJECT LIFECYCLE

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BUSINESS ANALYST AS CHANGE MANAGER

• You know your stakeholders
• You understand their ability to absorb the change
• You know the particulars of the change
• You have access to the right people
• You are (explicitly or implicitly) responsible for the successful adoption
AGENDA

1. Why change management
2. CM & PM Integration
3. Introducing change
4. Resistance management
5. Celebration of successes
WHY SHOULD WE CARE ABOUT CHANGE MANAGEMENT?

• Because project management is changing

• Expectations of a project is broadening from the introduction of something new to full service

*a “full service” concept of delivering new ways of working*
WHY SHOULD WE CARE ABOUT CHANGE MANAGEMENT?

• Because it supports the delivery of benefits

• The more effective our change management effort is, the more likely we are of meeting or exceeding project objectives

the ROI of change management is the ROI of the project or initiative
Projects that Met or Exceeded Objectives

- Poor change management: 15%
- Fair change management: 42%
- Good change management: 76%
- Excellent change management: 94%

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WHY SHOULD WE CARE ABOUT CHANGE MANAGEMENT?

• Because it mitigates and minimizes resistance

• Resistance to change needs to be managed just like any other project risk

Comfort with the status quo is extraordinarily powerful, expect resistance to change
PROJECT AND CHANGE LIFECYCLE

SDLC Lifecycle

• Concept
• Design
• Develop
• Test
• Deploy

Change Lifecycle

• Awareness
• Enthusiasm and Participation
• Engage Users
• Manage resistance
• New ways of working
PROJECT AND CHANGE LIFECYCLE

PROSCI’s ADKAR Model

SUCCESSFUL CHANGE

PHASES OF A CHANGE PROJECT
THE RIGHT CHANGE MANAGEMENT MIX

ONE SIZE DOES NOT FIT ALL
ALL CHANGE IS HARD AT FIRST MESSY IN THE MIDDLE AND GORGEOUS AT THE END.
How do we make it less hard at first ...
Increased emphasis on communication during a major change is essential
Truly effective communication in a changing organization is an overwhelming challenge.
Information plus Technology does **not** equal Communications
REMEMBER THE BASICS

• 5 – 7 X’s Rule
• Vary the medium
• Simple and direct is best
• Find the right sender
REMEMBER THE BASICS

• Listening is twice as important as talking
• Consider appropriate timelines
• Use metaphors and analogies whenever possible
• Tell them the truth – the good and bad
• People usually complain before they create
THREE ESSENTIAL PRINCIPLES

1. Communication from supervisors and sponsors
2. If it isn’t face-to-face, it isn’t communication
3. Focus on the impact at the local work area
FOUR THINGS TO AVOID

1. Secrets
2. Surprises
3. Hype
4. Empty promises
COMPONENTS OF AN EFFECTIVE COMMUNICATIONS PLANS

WHO needs to know (all stakeholder groups)

WHAT and (questions, issues, concerns)

HOW is the best way to tell them (methods, timing, who’s delivering this)
ACTIVITY: COMMUNICATION PLAN

WHO?

WHAT?

HOW?
ACTIVITY: COMMUNICATION PLAN

WHO?
- Webinars
- Q&A Sessions
- Leverage Change Champions
- Internet Forums
- Testimonials
- Letters
- Town Hall Meetings
- Team One-On-Ones
- Key Messages
- Brainstorming Workshops

WHAT?
- Training
- Feedback Sessions
- Peer Stories
- Lunch and Learns
- Screensaver Messaging
- Newsletters
- SharePoint Series
- CEO Messages

HOW?
- Walkabouts
- Demos
- FAQ’s
- Peer Mentoring
- Brainstorming Workshops
CONFIRMING EFFECTIVENESS OF COMMUNICATIONS

<table>
<thead>
<tr>
<th></th>
<th>Board of Directors</th>
<th>Executives</th>
<th>Senior Mgmt</th>
<th>Managers</th>
<th>Team Leaders</th>
<th>Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awareness</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Understanding</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Commitment</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
ACTIVITY: EVALUATE EFFECTIVENESS

Employee Feedback Template

Rank the following statements (1=strongly disagree, 5=strongly agree)

AWARENESS

I understand the business reasons for the change.

☐ 1    ☐ 2    ☐ 3    ☐ 4    ☐ 5

I understand the risks of not changing.

☐ 1    ☐ 2    ☐ 3    ☐ 4    ☐ 5

I understand the impact on my day-to-day work activities.

☐ 1    ☐ 2    ☐ 3    ☐ 4    ☐ 5
DESIREE

I am personally motivated to be part of the change.

1  2  3  4  5

I look forward to the new, changed environment.

1  2  3  4  5

My peers support the change.

1  2  3  4  5

My supervisors and managers support the change.

1  2  3  4  5

Executives and key business leaders support the change.

1  2  3  4  5
KNOWLEDGE

I have the skills and knowledge to be successful during the change.

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5

I have the skills and knowledge to be successful after the change.

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5

Training has been adequate to prepare me.

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5
ABILITY

I have the ability to perform the new duties required by the change.

☐ 1    ☐ 2    ☐ 3    ☐ 4    ☐ 5

I can get support when I have problems and questions.

☐ 1    ☐ 2    ☐ 3    ☐ 4    ☐ 5

I have practice at performing in the new environment.

☐ 1    ☐ 2    ☐ 3    ☐ 4    ☐ 5
REINFORCEMENT

The organization is committed to keeping the change in place.

I know the consequences of not performing my new activities.

I am rewarded for performing in the new way.
YOU’LL NEVER HAVE ALL THE ANSWERS

Remember:

• Tell people how and when answers are being decided
• Explain delays
• Describe how problems will be addressed
• Tell people everything you know
• Empathize that you know this is a difficult time
• Support staff throughout the change
• Never say ‘trust us’, ‘stop complaining’, ‘you are lucky you have a job here’, ‘do more with less’ or ‘work smarter not harder’
All change is hard at first, messy in the middle, and gorgeous at the end.
How do we make it less messy in the middle ...
CHANGE REACTIONS - WHAT ARE THEY AND HOW CAN THEY BE MANAGED?
Remember supervisors and their employees may move back and forth on this scale. You must regularly monitor and review to determine staff’s emotional position.
### Active Resistance
The most abrasive response to change and the easiest to identify. Employees can respond by attacking the messenger and expounding on either the impracticality or the irrelevancy of change.

### Symptoms
- Accusing management of poor decision making.
- Expressing anger over the change.
- Impeding the progress of change.
- Creating rumors.
- Damaging credibility.

### Cures
- Employ active listening.
- Clarify viewpoints.
- Recognize potential areas of active resistance early and identify a response.
- Avoid a public display of anger as it can gain momentum.
RECOGNIZE THE POTENTIAL REACTIONS TO CHANGE

Detachment
Silence does not indicate agreement with the change. Follow up and determine their real opinions and responses to the change. This will require the leader to reach out and investigate the meaning behind a team member’s inertia.

Symptoms
- Non-communicative with everyone.
- Inaccessible.
- Unenthused and uninterested when asked for their opinion.
- Silent and non-participatory during meetings.

Cures
- Over-communicate.
- Actively connect with employees who are reserved.
- Allocate accountability to create buy-in.
**Questioning**

Employees will have questions throughout the entire change. Questioning results from:

- Confusion regarding the change; staff are looking to clarify their understanding.
- Skepticism of the current situation. Staff will openly question decisions, but are constructively critical and provide solutions.

**Symptoms**

- Failure to understand new processes.
- Confused by conflicting rumors.
- Openly questioning decisions.
- Providing alternative solutions.
- Unsure of importance of the change.

**Cures**

- Reiterate new processes and procedures in a different way.
- Create feedback loops.
- Rumor-busting.
- Incorporating suggestions when feasible.
- Answering questions constructively.
Acceptance

Employee acceptance is the ideal state. When employees are bought into the need and purpose of change, they will be supportive and will help to implement the change successfully. These individuals can be used as “change agents” and are valuable allies. They can be used to align those who are either detached or questioning.

Symptoms

- Enthusiasm – showing interest, offering to help, and providing solutions.
- Supportive – incorporating their own ideas into the solution.
ACKNOWLEDGE THE EMOTIONAL RESPONSES THAT EMPLOYEES HAVE ABOUT THE CHANGE

Remember to give employees time to internalize the change and adapt.
ACTIVITY: SELF REFLECTION

Self-assessment: What is your reaction to the change?

Change Reactions

- Active Resistance
- Detachment
- Questioning
- Acceptance
ACTIVITY: ANTICIPATE RESPONSES

Anticipate the emotional response of your team

<table>
<thead>
<tr>
<th>Change Reactions</th>
<th>Active Resistance</th>
<th>Detachment</th>
<th>Questioning</th>
<th>Acceptance</th>
</tr>
</thead>
</table>

Name: Ji-Won

Emotional Response: Questioning

Risk: Could influence others

Solution: 1-1 meeting
## ACTIVITY: BUSINESS READINESS CHECK IN

**Business Readiness Assessment**

<Insert Change Initiative/Project>

<table>
<thead>
<tr>
<th>NAME:</th>
<th>DATE:</th>
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</thead>
</table>

<p>| | | |</p>
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<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Are you aware we are implementing &lt;project&gt;?</td>
<td>Yes</td>
</tr>
<tr>
<td>2.</td>
<td>Do you feel informed about &lt;project&gt;</td>
<td></td>
</tr>
<tr>
<td>a.</td>
<td>How have you kept informed? What has worked well?</td>
<td></td>
</tr>
<tr>
<td>b.</td>
<td>Is there a different way that would have worked better for you?</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>What do you know or believe is the purpose (or need for) moving &lt;project&gt;?</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>What do you see as the benefits of &lt;project&gt;?</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>What are some of your concerns about &lt;project&gt;?</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>What are some of your questions about &lt;new process / new technology&gt; or about the project in general?</td>
<td></td>
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<tr>
<td>7.</td>
<td>Do you believe that this will change the way you work day-to-day?</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>If yes: How will it be different for you?</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>Do you believe that this will change the way you work with others in your day-to-day work?</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>If yes: How will it be different?</td>
<td></td>
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<tr>
<td>9.</td>
<td>Based on what you understand today, what is your level of support for &lt;change/project&gt;?</td>
<td>In favour</td>
</tr>
<tr>
<td>10.</td>
<td>What do you think you need to be in place to support you:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Before implementation:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>During implementation:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>After implementation:</td>
<td></td>
</tr>
</tbody>
</table>

11. When we start <project> how do you want to provide feedback on how things are working for you?
ACTIVITY: BUSINESS READINESS CHECK IN
ACTIVITY: BUSINESS READINESS CHECK IN

<table>
<thead>
<tr>
<th>Response</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No response</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Opposed</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Neutral</td>
<td>5</td>
<td>10%</td>
</tr>
<tr>
<td>Between in favour and neutral</td>
<td>2</td>
<td>4%</td>
</tr>
<tr>
<td>In favour</td>
<td>43</td>
<td>83%</td>
</tr>
</tbody>
</table>
ALL CHANGE IS PERSONAL

Kathleen Kelly: “What is that supposed to mean? I am so sick of that. All that means is that it wasn't personal to you. But it was personal to me. It's *personal* to a lot of people.”

Joe Fox: It wasn't... personal.
REGARDLESS OF THE SIZE OF THE CHANGE, IT WILL ALWAYS HAVE AN IMPACT ON SOMEONE

• To avoid downplaying the impact on your employees, be empathetic and put yourself in their position by:

  – **Being aware** of the impact of new processes or policies at an individual level and your teams
  
  – **Actively listening** to what they are saying to you
  
  – **Asking** them how the change is affecting their work and if you can help
CHANGE RESISTANCE STRATEGY

- Provide clear, simple choices and consequences
- Bring people together for info sessions, Q&A sessions, demos
- Give them an opportunity to be involved
- Give them the opportunity to provide feedback
- Give them the ‘why’ behind the decision
- Give them the WIIFM
- Hear them out and understand where they may be coming from
- Provide incentives
- Acknowledge that feeling uncomfortable in change is normal
- Support leaders to see early warning signs and support
- Phase in the change
- Support leaders to see early warning signs and support resolution
- Use change champions and super users
- Show the benefits in a tangible way
- Remove barriers
- Make a personal appeal
- Allow them to grieve
- Give them free access to professional (psychological) support
- Provide clear, simple choices and consequences
- Use change champions and super users
- Make a personal appeal
- Convert your strongest dissenters
- Have managers role model what you’d like to see from them
- Make sure the right person is giving the message
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All change is hard at first, messy in the middle, and gorgeous at the end.
How do we make it even more gorgeous at the end ...
FEEDBACK FROM EMPLOYEES

FEEDBACK
ACCOUNTABILITY SYSTEMS

• Aligned performance measures with the change
• Collect performance data
AUDIT AND COMPLIANCE

• Evaluate the usage of new processes and tools to ensure compliance with the change
• Identify where old processes or tools are being used
• Identify any remaining pockets of resistance
ROOT CAUSE AND CORRECTIVE ACTION

PROBLEM: ___________

Why?

Why?

Why?

Why?

Why?

ROOT CAUSE
CELEBRATE SUCCESS & RECOGNITION

• Privately recognize individuals
• Publically recognize individuals and groups
• Celebrate with the team (formally and informally)
• Reward team and individuals for their accomplishments
Decision Making / Prerequisites Established

30-60-90 Day Check-Ins

Visibility Walls with Actuals vs. Targets (Celebration of Successes)

QA Process Established and Implemented

Individual Post Go-Live Check-in

Individual Benchmarking Report (Compliance or improvement audit report card)

Part of individual’s ongoing Performance Management or Development Plan

Ad Hoc Best Practice Sessions

Communities of Practice / User Group

Feedback

Growth & Learning

Compliance & Audit Performance

Benefit Realization

Time

Project Driven → Operations Driven

Foundational → Optimizing
RESOURCES I LIKE

• Wavelength communication skills training
• Management 3.0
• APMG Change Management (Melody Franklin)
• Prosci Portal
• Destination Leadership (Shana Ring)
• Change your Questions Change your Life -- Marilee Adams
REFERENCES

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QUESTIONS?

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