
Developing a Change Management Program

Previous articles in this series have discussed the need for change management as a key success factor when implementing new systems. Once the need for change management is accepted, the next stage is to develop and implement an integrated program that will deliver the required support for system change.

The KISS Principle of Change Management (Keep it Systematic and Sustained).

It takes considerable effort and commitment to shift change management from a throw-away phrase to a concrete and tangible working plan.

Many change activities are so basically simple that it's easy to assume that they will be done or are being done, or that they will just happen. Not so. The trick is to incorporate even the simplest of activities into your change program from Day One, so that they are systematic and sustained. Otherwise, they will just drop off the agenda.

You can achieve this by scheduling and tracking change activities using standard project management tools such as Microsoft Project. Better still - incorporate your change management program within your overall project plan so that change activities are truly integrated. After all many typical project activities have change management implications; for example - decisions made at project meetings should be circulated to the people who will be affected by them.

Setting Change Objectives

A key change objective, which can be measured, is achieving user uptake and acceptance of your new system.

It is not the organisation that changes – it is the people. Your change program must focus on people – especially on individuals. Each individual has a different concept of how a change will affect him or her and they will change for their own reasons – not for yours.

To implement sustained change our change initiatives must be targeted to each individual who will be affected. A “one size fits all” change approach is unlikely to succeed because fails to address individual concerns and behaviours.

Building a Change Management Program

In developing a start-to-finish change program, change activities can be grouped into three phases as follows:

- Phase 1 Seeking commitment to change
- Phase 2 Developing the environment for change
- Phase 3 Implementing change

The level of change activity for each phase will vary depending on the preparedness of the organisation: - internal awareness, maturity of current systems, preparedness of staff, prior training environment.

1. Seeking Commitment to Change

This change phase underpins project success but is seldom accomplished. The objective of this phase is to obtain total buy-in and commitment from executive management to secure appropriate funding for the change, and to use the findings throughout the project as an ongoing justification for change.

Change Activities

The change strategy is to assess the organisational costs of not changing. This information is then used to build the business case for the proposed changes. Specifically for information management systems:

- Use process mapping to reveal current practices and compare time and resource costs to the value of outputs
- Analyse, through staff surveys, the time spent in information management activities against the time spent in core business activities. Validate the results through interviews and observation.
- Collate the total annual costs of the organisation's information management "occurrences", i.e. discovery exercises, FOI requests, subpoenas, lost files and documents etc.
- Scope and estimate total costs for the proposed solution including change management.
- Build a financial cost benefit analysis
- Analyse the competition to assess what systems they use to gain competitive advantage
- Present / publish the results firstly to management and then throughout the organisation
- Keep updating the business case with fresh examples and publish the updates on a regular basis

2. Developing the Environment for Change

These three classes of change activities – consultation, communication and involvement - are not exclusive to this phase but should be undertaken throughout the entire life of the project.

a) Consultation

The objective is to engage with individuals and groups within the organisation for the purpose of enabling each way communication; Understanding the information management needs of individuals and groups; and surfacing resistance where possible so it can be recognised and managed.

Change Activities

The change strategy is to traverse the organisation both vertically and horizontally, targeting groups and individuals in many different ways.

- Schedule awareness sessions and focus groups to discuss the costs of current practices (the business case), the benefits of change and problems that change will bring. Groups need to be small enough to promote open discussion. Individuals are more likely to discuss problems with their peers than in a vertical situation.
- Use process mapping as a means to consult with groups and individuals. Mapping information processes provides valuable information to all involved about the costs and relevance of current practices and the benefits that a new system may bring.

- Schedule interviews with opinion leaders and influencers to gauge support and resistance.
- Develop feedback mechanisms (i.e. an Issues Register) so that all issues and problems raised are logged and followed through in a managed process. This will also help to identify common problems and trends.

b) Communication

The objective is to deliver to individuals as much information as they need in a timeframe when they are ready to receive it.

Change Activities

The change strategy is to set up a communication infrastructure that enables individuals to be reached in many different ways over time.

- Develop a “corporate style “ for the project that is instantly recognisable
- Use the intranet as a central repository for publishing all relevant project material.
- Provide a feedback button on the intranet for recording issues, ideas and suggestions.
- Pin up posters, send out email that direct people to information sources
- Send out regular newsletters (electronic and hard copy) with relevant content, including reporting on internal/ external events that support the business case
- Send our regular project notifications about meetings; decisions; project schedules; new content on the intranet
- Make project progress a standard agenda item for all relevant meetings including board & executive meetings.

c) Involvement

The objective is to transfer ownership of the system and associated change from the project team (facilitators) to the organisation (the management, business groups and individuals who are users and benefactors of the system).

Change Activities

The change strategy is to involve as many people within the organisation in the project from the very beginning so that ownership is gradually assumed.

- Create and empower teams to take ownership of project decisions– ie steering committees, user committees, evaluation teams. Business groups should be involved in any decisions which affect them such as timing of rollout and training.
- Involve early adopters as expert users and internal trainers
- Use process mapping as a means of engaging individuals and groups to use the system with a view to solving their own process problems
- Involve users in the design and configuration of new systems, and in testing the changed systems.

3. Implementing Change

In implementing change, the objective is to maximize take-up of new systems and practices so that the benefits of the change can be experienced.

Change Activities

The change strategy is to provide a broad range of training and support options that meet the different learning needs of each individual so that maximum benefit is achieved from the training and support they receive.

- Develop a training database with which to record individual training needs and track progress
- Schedule classroom training in modular chunks so that users can master each stage and build their skills incrementally. For some this may be days, for others weeks.
- Provide “personal training” which includes short cut training
- Provide desktop tailoring support to identify and implement ways in which the system can make individuals more productive.
- Provide closed-door sessions for managers.
- Provide catch up training in basics ie windows 101 and MS Office.
- Provide a range of training materials to meet different needs (i.e. help cards, cheat sheets and online help)
- Monitor user outputs and apply remedial training where necessary
- Develop a training checklist to assess individual progress
- Provide support services to help business groups over the implementation hump; i.e. data migration services

Resourcing

Comprehensive change activities cannot be delivered without appropriate resources.

The time and effort it takes to shift users from established systems and practices is difficult to estimate and is usually grossly underestimated.

Too often it is during the implementation phase that the change effort breaks down particularly if there are insufficient training and support resources to carry users over the implementation hump. This is the point where users and their managers are most likely to check out from the change effort, despite the optimism built through consultation, communication and involvement. And without a compelling business case, it is unlikely that additional resourcing will be provided. End of system and negative return on investment!!

The time to assess resourcing costs is during Scoping in Phase 1. This is when the budget for change can be determined upfront and incorporated into the cost benefit analysis. Budgeting up front has the benefit of no nasty surprises emerging during the implementation phase.

The cost of resourcing “change management” services is generally between two and five times the system costs, subject to the level of organisational preparedness. While this may come as a shock to some, if a compelling business case is there to support the change, together with a thoroughly prepared and costed change management program, obtaining funding should present few problems.