

Change Management

*Creating Change Competence
And Support
Through Employee Participation*

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About Me

- Learning and OD and change management practitioner
- Project sponsor, project leader, change management leader
- Team member, supervisor, regular employee
- Lots of successful change initiatives
- Lots of unsuccessful change initiatives
- Learned fundamental practices that can help

Workplace Change is Constant

External sources:

- Technology, globalization, government regulation
- Competitors, customer demands
- Pandemic ...

Organizational response:

- New technology, processes, procedures
- New business models, acquisitions, divestitures
- Restructures ...

Sustained Change Method

Prepare employees to expect continuous change

- Hiring
- Onboarding
- Employee development
- Performance management
- Succession management

The Work of Change Initiatives

Planning and Deciding

Engaging Stakeholders

Implementing

Communicating

Testing and Refining

Training

Monitoring and Adjusting

Managing Resistance

Managing Risk

Leading

The “Chosen Few” Doing the Work

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Passive Mindset

I expect change but ...

- It's something "other people" are responsible for
- Change is happening to me
- I'm not in control
- I don't have opportunities to contribute
- I don't have the knowledge/skill to help
- I don't support this change

Active Participation

I expect change and ...

- It's something I have responsibility for
- I'm actively involved
- I have choices
- I have opportunities to contribute doing real work
- I can develop the knowledge and skill to help
- I support this change

The “Chosen Few” Doing the Work

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Expand Opportunities to Do the Work



Opportunities for Real Work

- Developmental project team assignment
- Transition monitoring team
- Red team
- Quality assurance tester
- Action review participant
- Supervisors

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Developmental Project Team Assignment

- Reserve a few “seats” for developmental participants
 - Note taker during stakeholder analysis
 - Research and analysis
 - Review plans and documents
 - Manage Q&A during town hall communications

What Project Team Members Learn

- Understand needs/requirements of other job functions
- Research/evaluate alternative paths to achieving goals
- Propose and defend decisions
- Navigate conflicts and negotiate agreement

What Project Team Members Learn

- Deliver presentations
- Communicate at multiple levels
- Manage complex tasks in a tight timeframe
- Use project and change management practices/tools

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Transition Monitoring Team

aka Change Champions

- Team without responsibility for planning or implementation
- 1+ member from each area affected by the change
- Informal peer advocacy within their department/area
- Internal focus group for the project team
- Supplement to formal communication and supervisor updates

Transition Monitoring Team

Periodic updates with the project team

- Update on coworker needs, issues, concerns
- Internal focus group on what's coming next

Regular communication with coworkers

- Here's what's coming next and how it affects us
- Reminder: here's what we need to do next
- How's it going? What do you think?

Selecting TMT Team Members

1+ representative from each area who is:

- Interested in the project and/or already supports it
- Respected by peers as competent and trustworthy
- Viewed by peers as informal leader/advocate
- Someone employees listen to for honest information
- A peer employees seek out for guidance
- A coworker employees share their concerns with

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Red Team

“Devil’s Advocates” or “Challenge Team”

- Independent group – not the project team, TMT, sponsors
- Meet periodically to critically review plans and decisions
- Focused on identifying:
 - Why things may not work
 - Mistaken assumptions
 - Risks
- Helps project team improve plans before taking action

Selecting Red Team Members

Functional experts

- Seasoned staffers who have “seen it all”
- Battle scarred who learned from their mistakes

Analytical thinkers

- Fearless critical thinkers and creative non-conformists
- High potential program participants
- Risk management and compliance staff

Selecting Red Team Members

Critics of the change

- Resisters
- Contrarian viewpoints

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Quality Assurance Testers

- Test new processes, procedures and technology
- Provide pre-scripted test-case scenarios
- Ask testers to create their own scenarios

- Builds confidence that the change will work
- Develops competence in changed procedure/technology
- Can reuse testing scripts in training

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Action Reviews

Periodic meeting where project team discusses:

- What is supposed to happen – expected outcomes
- What is happening – actual results
- Why is this happening – root causes
- What should we do about this – action plans

Action Review Participant

- Provides project team with the customer/user perspective
- Shows employees that their perspective matters
- Helps participants contribute to continuous improvement
- Shows employees that mistakes/errors are expected and ok

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What We Need Supervisors to Do

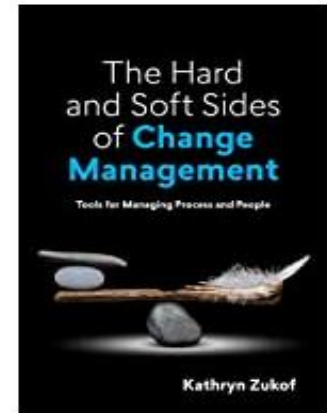
- Help direct reports understand what's changing and why
- Provide employees with resources to build needed skills
- Coach and encourage employees to try things out
- Model new behaviors

Help Supervisors Participate

- Share information in advance of announcements
- Provide communication scripts and Q&A sheets
- Have them tailor implementation plans for their area
- Provide scripts and resources to reinforce training
- Check in frequently regarding what's working/what isn't

Try This at Home First!

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Questions? Ideas?

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