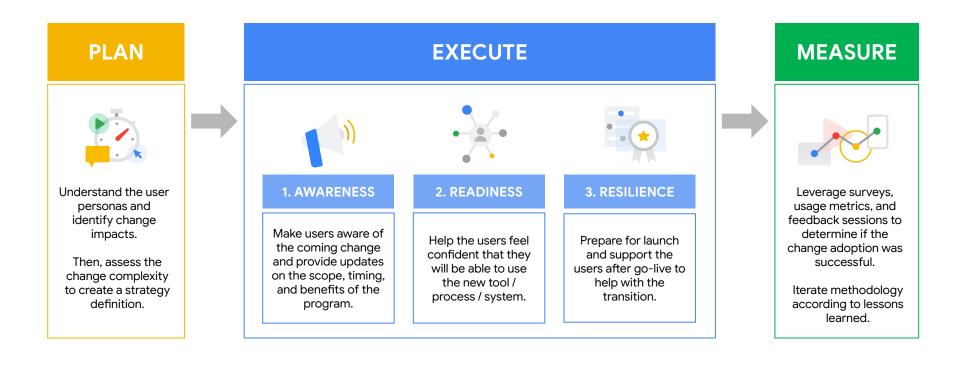
Change Management Guiding Principles

The goal of change management is to minimize the impact of a change on productivity by engaging employees early during the transition to mitigate resistance and drive effective adoption of new processes.



How do we approach change management?

First, we strategize by assessing who and what will be affected by the change. Then, we execute that strategy in three phases—Awareness, Readiness, and Resilience—to ensure the positive reception of the change! Finally, we measure adoption.



Planning: User Centricity

The audiences of the change are a top priority when enacting a change! Follow the steps and complete the deliverables to form a comprehensive view of your audience that will help you keep them top of mind while navigating your change.

- Who does the change affect?
 - ldentify key users and groups that will be affected by the
 - Conduct interviews to understand these users' roles, responsibilities, and needs.

change.

 Create an accompanying document detailing which users are affected and how.

- How does the change affect them?
 - Now that you know WHO will be affected, define HOW the change will affect each user group.
 - Describe specific changes and their impacts (positive and negative) by user group.
 - Create simple statements about the benefits of the change for users groups. (E.g., This change enables the learner to make data-driven decisions.)

- 3. Strategize how to help them transition
 - With the WHO and the HOW defined, you can now begin thinking through the best way to communicate with and train your user groups about the change.
 - Create and tailor a communication plan specific for each group you'll be working with.

Stakeholder Management: Broad "User" Focus

One of the big benefits of starting change management earlier on is having time to invest in stakeholder management and include a broad user-centric perspective into the overall project strategy and decisions.

It is easy to only focus on groups that are <u>directly</u> involved in the change.



End Users



Tangential Teams



Executives/ Leadership



Sales & Marketing Teams

Change management accounts for and supports all impacted groups.



Execution: Communication Philosophy

When creating change management communication documents or preparing for a meeting, it is important to keep three main guiding principles in mind:



Execution: Other Change Considerations

Once you understand the complexity of the change, you will need to figure out the mediums by which you will deliver the communications and training. Consider the following things when determining the best way to execute your change strategy:

How many people are impacted?

Less than 50

Consider in-person meetings for complicated changes and emails for simple changes. It isn't worth building high-effort material for a small group.

More than 50

Consider creating concise, clear documentation, with some virtual content via email, decks, etc. to help disseminate information.

What is the geography of the change?

One Location

You have the option to do in-person meetings and live trainings if the change needs it.

Multiple Locations

Consider e-learnings for complicated changes and email communications for simple changes since in-person engagement is not as feasible. Is it a highly visible change?

Highly visible

Consider developing help centers, websites, and training documentation so users feels confident that sufficient support and resources are in place.

Low Visibility

Stick to the critical items that are needed for your change since users will not need that kind of visibility into the project.

What is the perception of the change?

Neutral / Positive

Continue driving the positive outcomes of the change for end users to get their buy-in.

Negative

Acknowledge and address concerns in the communications and training. Consider providing detailed explanations for the change and offer outlets like office hours for users to ask questions.

Is the change critical?

Critical

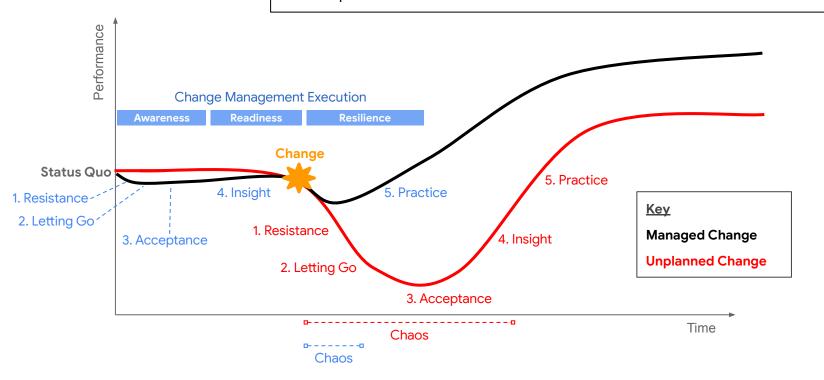
Critical changes, especially if dependent on user actions, should consider employing high-effort execution options like in-person trainings and e-learnings. Also consider having touch points more often.

Not critical

Consider using low-effort options like email and slides.

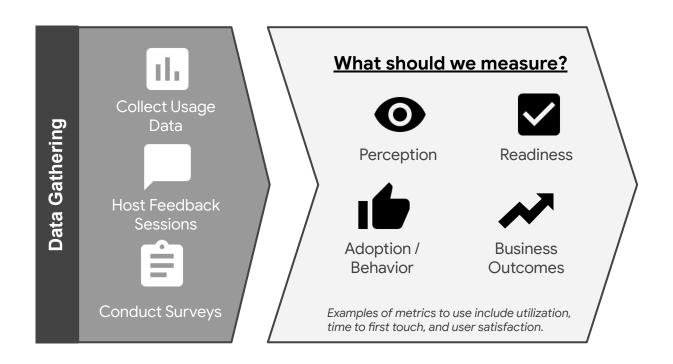
Change is an emotional process

You can use this change model to understand how your team copes with change and to help move them through change more quickly and efficiently. The ultimate goal is to increase your team's performance, but this takes time and **things usually get worse before they get better**. The dip in performance and the duration of the dip can be minimized with effective change management, communication, and leadership.



Measure: Assessing Adoption

Once the change is implemented, it is important to measure how well the change was adopted. The goal is to use both quantitative and qualitative data to understand the overall success of the change.





Adoption Report

Summarizes the findings and verifies that the change is stable.

Provides insight into any need for a change team in the future.

Summary

Be user-focused but also expand your definition of "user."



End Users



Tangential Teams





M&S Teams

& more!

2 Key steps in the change management process:

PLAN

EXECUTE

1. AWARENESS 2. READINESS 3. RESILIENCE

MEASURE

There is no-one-size-fits-all approach to change management! Remember, it is an art more than a science.







Consider change perception, geography, visibility, complexity, audience, etc.