



Change Management Methodologies - what does good like?

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88% of the most agile organisations had established formal change management processes.

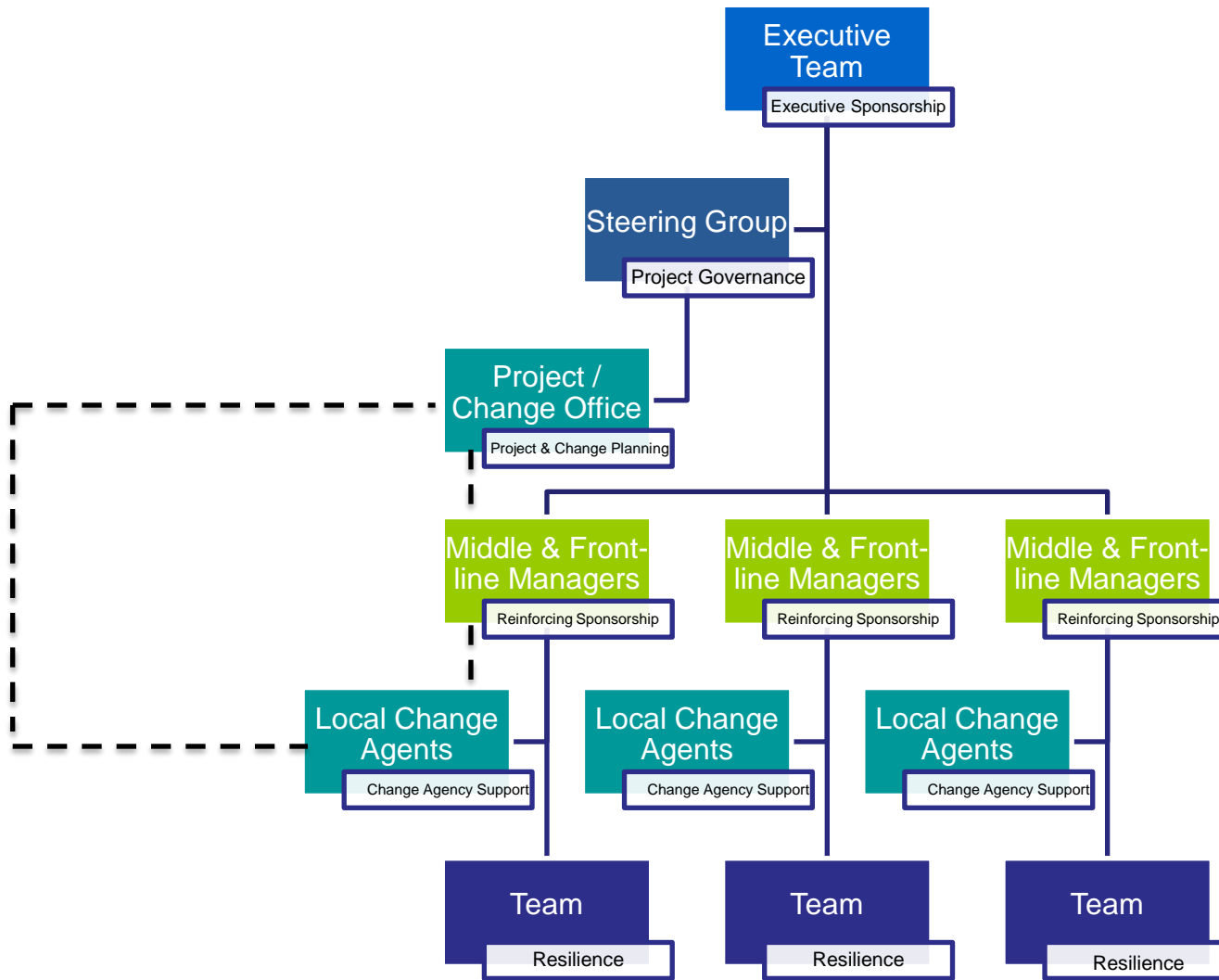
PMI Organisational Agility Survey 2014
PMI – Pulse of the Profession

What does good look like?



For change to be successful, everyone has a role to play. Good methodologies and approaches will provide different employee groups with what they need to play their role and contribute to success.

Everyone has a role to play



A change methodology needs to be practical and can be easily applied to a range of situations. A methodology should also have depth – providing not only the “what” but also the “how”.

People Change Plan Completion

Use the table below to track your progress in creating your PCI Plan, and to navigate to the relevant section within the plan. There are star icons at the end of the stages shown below - they represent Quality Gates, which are milestones in a project that should be reached before continuing onto the next stage.

PRINCE2	Critical Success Factors (CSF)	People Change Process	Complete
Start Up	CSF 1 - Shared Change Purpose	Build the Change Purpose Statement	<input type="checkbox"/>
		Analyse Impacts and Risk	<input type="checkbox"/>
		Plan the Communication and Kick-Off	<input type="checkbox"/>
Initiate & Plan	CSF 2 - Effective Change Leadership	Map the Change Network	<input type="checkbox"/>
		Identify Stakeholder Issues	<input type="checkbox"/>
		Select the Change Agent Team	<input type="checkbox"/>
		Develop the Sponsor Network	<input type="checkbox"/>
Control	CSF 3 - Powerful Engagement Process	Assess Adapter Readiness	<input type="checkbox"/>
		Build the Engagement Plan	<input type="checkbox"/>
		Prepare Local Sponsors	<input type="checkbox"/>
Close	CSF 4 - Committed Local Sponsors	Engage Local Change Agents	<input type="checkbox"/>
		Build Local Deployment Plans	<input type="checkbox"/>
		Track Change Progress	<input type="checkbox"/>
Close	CSF 5 - Strong Personal Connection	Build Local Deployment Plans	<input type="checkbox"/>
		Track Change Progress	<input type="checkbox"/>
		Track Change Progress	<input type="checkbox"/>
Close	CSF 6 - Sustained Personal Performance	Track Change Progress	<input type="checkbox"/>
		Track Change Progress	<input type="checkbox"/>
		Track Change Progress	<input type="checkbox"/>

Step by step approach

People Change Plan – [Project Name]

How To

Build the Change Purpose Statement

Drafting the change purpose statement into an "elevator speech" and ensuring that there

Build the Change Purpose Statement

Use the following table as a guide to help you build your case for this change.

Preparation	Implementation	Follow-Up
<ul style="list-style-type: none"> Obtain leadership commitment to change management Engage with the Communications Manager Secure leadership commitment to Elevator Pitch process Secure leadership commitment to the Elevator Pitch workshop process Send out workshop agenda and Initial Change Description (ICD) tool Analyse ICD pre-work 	<ul style="list-style-type: none"> Facilitate Sponsor group meeting Highlight any significant differences between the participants' pre-work Create Elevator Speech Debate how to improve the Elevator Speech. 'Hot-seat' the Elevator Speech Outline next steps 	<ul style="list-style-type: none"> Road-test the Elevator Speech Agree on final version(s) of speech with Key Sponsors Engage with the Communications Manager about communicating the change Revisit the Elevator Speech regularly
Tools and Templates <ul style="list-style-type: none"> Initial Change Description 		

Print

There is a set of specific milestones and deliverables to show people how progress will be made and the time needed to reach the future state vision

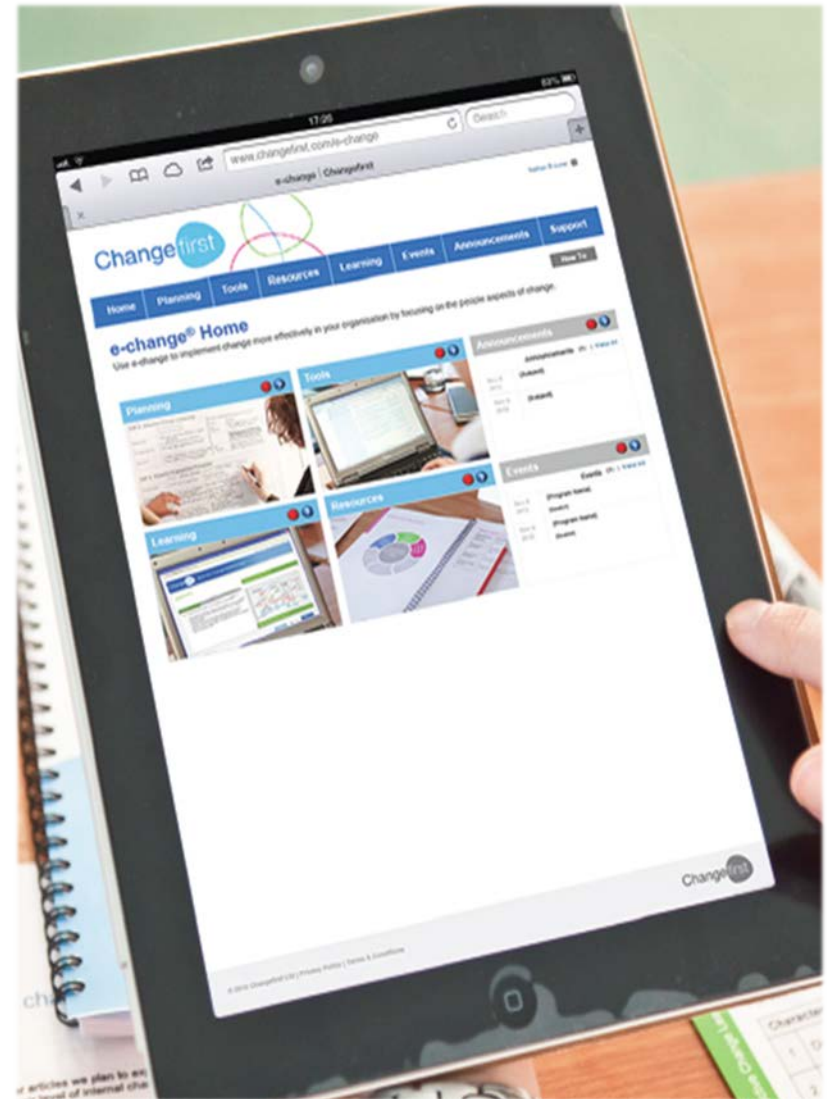
Embedded execution guide

Clear All Save

Close

A good methodology should be easy to learn
and can be deployed rapidly.

- ❑ Online - provides access to:
 - ✓ e-learning
 - ✓ Planning tools & templates
 - ✓ Execution guide
 - ✓ Diagnostic tools
 - ✓ Resources
- ❑ Blended
 - ✓ e-change
 - ✓ PCI Practitioner Program
 - ✓ 3 day action learning



A good methodology will align with other organisational processes & provide the ability to monitor and track change progress.



PMI		Critical Success Factors (CSF)	People Change Process	Complete
Initiate	Close	CSF 1 - Shared Change Purpose	Build the Case for Change	<input type="checkbox"/>
			Analyse Impacts and Risk	<input type="checkbox"/>
			Plan the Communication and Kick-Off	<input type="checkbox"/>
Plan	Close	CSF 2 - Effective Change Leadership	Map the Change Network	<input type="checkbox"/>
			Identify Stakeholder Issues	<input type="checkbox"/>
			Select the Change Agent Team	<input type="checkbox"/>
			Develop the Sponsor Network	<input type="checkbox"/>
		CSF 3 - Powerful Engagement Processes	Assess Adapter Readiness	<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Initiate Stage Quality Gate

Leaders understand the general nature and scope of the change and feel that a compelling case for change can be made

- Elevator speech is agreed and *signed off* as ready for communication
- The potential disruption to people is understood and early impact and risk data has been used to determine the best implementation approach
- Draft Change Network Map and Stakeholder Issues log has been created

Changefirst

Assessment Help

For each question consider the extent to which you agree or disagree based on your personal opinions and feelings about change. Use the radio buttons to enter the appropriate score. You must complete every question then click NEXT to submit your assessment.

Adapter Readiness Assessment - Example

The questions below are designed to capture your view about the readiness for a change **within a group or individual**. Please consider a specific change that is being implemented in your organisation as the reference for this evaluation.

Each question should be answered from your personal viewpoint, based on your own opinions, knowledge, insights and feelings about the group or individual.

NOTE: This assessment can be used predictively by project teams or to gather views from those impacted.

All responses are confidential. No individual data will be reported to the organisation. All results will be represented as group data. We will not report data for any group containing less than 3 people:

For each question consider the following and enter the appropriate score.

When you think about the impact of the change on the Adapter group you believe that people...

	Strongly Agree	1	2	3	4	5	6	Strongly Disagree
1. Understand the reasons why they must personally change.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Understand how the change will affect them.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Are willing to perform their jobs in the new way the change requires.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Have sufficient time and energy to absorb this change (along with current work load and other changes being implemented).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Have the skills and knowledge required by the change.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Can influence the content of the change as it affects them.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Understand the plan to implement the change.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Identify key risk areas

Each tool has practical information to aid the practitioner in developing strategies to address issues and mitigate risk

Conduct Assessments

	Medium	High	Score	Action Plan
	3	4	5	6
1. Understand the reasons why they must personally change.	<input type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>
2. Understand how the change will affect them.	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>
3. Are willing to perform their jobs in the new way the change requires.	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>
4. Have sufficient time and energy to absorb this change (along with current work load and other changes being implemented).	<input type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>
5. Have the skills and knowledge required by the change.	<input type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>
6. Control	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>
7. Transition Plan	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>
8. Culture modification	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>
9. Learning Curve	<input type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>
10. Relationships	<input type="checkbox"/>	<input type="checkbox"/>	4	<input checked="" type="checkbox"/>
11. Security	<input type="checkbox"/>	<input type="checkbox"/>	1	<input type="checkbox"/>
12. Support Future State	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>

4. Change capacity

Note: This is one of the most common reasons for implementation failure. Sponsors have to make decisions about stopping or postponing other changes. Consider providing additional resources e.g. temporary staff. Clarity about how each change supports the overall Vision and strategy should help people focus on the Imperative changes.

Organisations & individuals gain confidence by adopting a proven, well researched & tested methodology.

The PCI Framework

- 40 years of academic research
 - Lewin, Kotter, Tichy, Block, Beckhard, ODR +
- 20 years of field application & testing
- Over 15,000 people trained in 175 organisations across 45 countries
- Continuous improvement



Thank you!

