

## **Case Study**

### **Moving Resisters of Change to Change Champions**

#### *Changing the Minds of Employees in Finance*

I was working with a mid-size professional services firm that was implementing a new financial system. The CFO asked me to work with him to help him manage this project with his team, with a focus on managing communications and change. He had a project manager who would be managing the day-to-day of the project.

In initial conversations with the CFO, I learned the following:

- He was fairly new to the organization, only being with the firm for 9 months.
- The current financial system was outdated and did not support the firm as well as it had in the past.
- The finance and payroll team had longevity with the firm and, in fact, 4 of the staff members in finance and payroll actually helped to select and implement the current financial system a number of years ago.
- The CEO and others on the executive team supported this project and were excited that a new financial system was being put in place.

The CFO realized that simply because the executive team supported the project and were ready to change financial systems, it was not sufficient. He needed to buy-in from the financial and payroll team in order to ensure the move to the new system was a successful one. He also noted that the project was officially kicking off within a few months and he wanted to be sure that a good number of the finance/payroll team were on board – even if not all of them were.

Further conversations with the CFO revealed the following:

- While a decision had been made on a particular financial system, no decision had been made yet on specific components/features of the system.
- The CFO wanted his staff involved in determining changes to processes and procedures to increase efficiencies within the group.
- The CFO had discussed the upcoming financial system project at a department meeting and, while people didn't actively resist, he noticed that staff, including his leadership team, were not entirely pleased with the idea.

#### **Initial Meetings**

We scheduled an initial department meeting with finance/payroll. Our goal was to share initial information about the project with a focus on benefits to both the organization in implementing a new financial system and to the individuals in finance/payroll. We needed the group to understand what was impacting this change and how their support was needed to ensure the initiative was successful. We also held a product demo so that the department members could see the new system “in action.”

The initial meeting went well; feedback was positive overall. The group understood the issues faced (the problem we were solving for) and seemed interested in the demo they saw. Some great questions came from the group!

We asked the group to spend some time digesting what they saw and heard in the meeting and that we would be setting up a subsequent meeting to talk further about the project and how we would like them to be involved. We asked them to put together any questions about the initiative that we could address at the next meeting.

The second meeting with the group was well attended, everyone made time on their calendar and attended the meeting. This was a good sign! We knew we still had a few resisters, but we also knew that they were interested enough to show up!

We took the first hour of the meeting to answer questions about the product being selected which had been submitted to us after the first meeting. We also knew there would be other questions that would arise. We had the vendor in attendance so that we could be sure to provide answers to all questions at that time and need no, or little, follow up. We knew that the quicker we could get people what they needed, the sooner we could increase their comfort level and move forward on the project.

After the demo at the first meeting, it was apparent that individuals in the room were excited about the possibilities of the new financial system. Certainly it would make their job easier and that was apparent to everyone. Even the individuals who implemented the system being replaced seemed excited, though we still knew we had to win them over.

Once all questions were answered, we focused our conversation on the need for participation on the project in a number of areas:

- Helping to determine exactly how the system will work for the organization (what features and functionality would be needed)
- Providing data necessary throughout the project
- Assisting in refining processes and procedures within the finance and payroll function
- Assisting in the design of the system and testing the functionality
- Helping to roll out the system and train end users

Everyone wanted to participate in some way; although we knew that some simply wanted to participate to maintain a feeling of control. That was fine with us. As long as we could get them to participate, we knew that we could eventually get them to come along and support the project. By participating on the project, they would feel that they had some control over what was happening rather than idly sitting by and waiting for the project to be rolled out.

We set up a preliminary resource grid as follows (shows key responsibilities):

<b>Name</b>	<b>Role/Title</b>	<b>Involvement on Project</b>
Allan Parker	Asst Payroll Manager	Project Team Lead - Payroll
Jasmine Simmons	Asst Financial Manager	Project Team Lead - Finance
Alice Rush Simone Anaheim Jim Theirault	Payroll	Provide data, assist with refinement of processes and procedures, assist in the design of the system, testers
Sam Jameson Donald Westergate Betty Winters	Finance	Provide data, assist with refinement of processes and procedures, assist in the design of the system, testers
John Pittman Sarah Evanstein Rafael Rodriguez Nancy Hartman	Members of payroll and finance functions	Testers

Other members of the payroll and finance functions would also be involved in the project, participating as needed in meetings and workshops related to the new system rollout and supporting the core project team members. The individuals in the table above, however, would be actively involved in the project and participating on a day-to-day basis – they were members of the core project team. They represented a variety of backgrounds, experiences and longevity with the company.

In summary – our introductory meeting with these individuals enabled of us to begin to establish a working relationship with them and get them engaged in the project. This second meeting enabled for continuing that relationship building and getting members of finance and payroll involved in the day-to-day work of the project, thereby increasing their commitment to the project. We knew that as they began to work on the project, their commitment would continue to increase and they would become our project champions – engaging others in their functions in the project and pushing to its success.