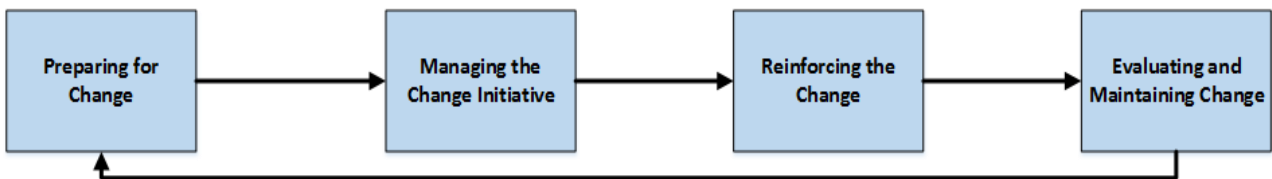


## Leading Organizational Change

Too often organizations tend to jump into a change initiative without doing upfront planning for the change. I have heard the following from clients:

- The change is not a big deal – let's just get going
- No one likes change anyway...so why waste time trying to sell them on it
- The change *has* to happen, there is no option – like it or not

However, if we follow a simple process, we can more effectively and successfully launch organizational change initiatives.



### Preparing for Change

*Prior* to launching an organizational change initiative, prepare for the change to occur. This enables you to gain support for the change and increase your chances of successful implementation of the change. Additionally, you often find that when sharing information on the change initiative with others – you may find out additional information that would impact the change initiative and/or enable for a more successful change initiative.

*What is the scope of the change?*

What is the impact of this change (who does it affect)? Is it just one department, workgroup? A division within the company or multiple division? Is it organization-wide?

The larger the impact of the change, the riskier the change is; therefore requiring more upfront planning.

*Is the organization ready for change?*

How are things currently in the organization? Is morale high? Are employees engaged? Is there other change efforts happening that will impact how this change will be received? How effectively and successfully have past change initiatives been implemented? Is there usually resistance to change?

If there is much happening currently in the organization, it may be difficult to undertake the change initiative now. Of course there are situations where the change must happen and it must happen *now*. In such cases, acknowledging that there is much happening and that it will not be easy to manage one more initiative helps to let employees know you empathize and understand the situation.

This is the start of socializing – or getting buy-in – for the change initiative. The more people you get on board and comfortable early on, the easier your change management project.

### *Who should be involved in planning for the change?*

In this first phase, determine who needs to be involved in planning the change initiative. For a cross-functional change initiative, be sure that each function is represented on the project team. You want a diversity of people on your planning team. Diversity enables for more creative problem solving and decision making. The more diversity on the team, the more likely you will successfully implement your change.

### **Managing the Change Initiative**

Once you have moved forward and launched the organizational change initiative, you will need to continue to socialize the initiative and get the project kicked off effectively.

### *Communicating with Stakeholders*

First, set up a communication plan to share with all stakeholders and inviting stakeholders to kick off meetings to get them used to the upcoming change and engaged in the initiative (share the communication plan at the kick off meetings). Notice that “meetings” is plural. Use a variety of ways (including meetings) to communicate with stakeholders (especially in a larger organization or when there are shifts) to ensure you capture as many folks as possible and get them engaged about the initiative. For example, I may set up the following types of meetings/communications to initially communicate the change initiative to employees within the organization:

- Face-to-face meetings (held in the morning, midday and end of day over a week time period)
- Information posted about the change initiative on an internal portal
- Email communications
- Posters in the hallway or café (in employee-only areas of the organization)
- Virtual meetings (at least 3 held at various times to accommodate a variety of schedules)

Your communication plan should include a plan for regular communications with stakeholders as the initiative progresses along with forums to ask questions and get clarification – such as through monthly lunch and learns, coffee sessions or via a portal.

Include in your communication plans a high level schedule for the initiative – such as when training will occur, when the change will be rolled out and other key details. This enables all employee to feel a part of the initiative and to understand what will be done to ensure they can be successful working within the changed environment.

Your very first communication will focus on the benefits of the change to both the organization and the individual employees along with the risk of *not* changing. You cannot effectively launch this initial communication until you understand your audience and their perceptions, overall, around change. You will need to craft your early communications about the change initiative to get employees excited and engaged early on in the process.

These initial communications are absolutely essential to the success of the organizational change initiative. You must get employees comfortable and on board with the change early enough. Spend the time on these initial and follow up communications *prior* to moving forward with getting started on the change project.

## **Reinforcing the Change**

During this phase, it is essential to gather, evaluate and address feedback you receive on the change initiative. This may be done through small group meetings, online survey or through one-on-one conversations with those impacted by the change.

During this phase we also want to continue to engage our stakeholders through celebrating early success and regularly “checking in” with stakeholders to ensure they are still feeling good and are engaged about the change.

We may be making adjustments to the change initiative as we roll it out based on feedback received and evaluating what works well and what does not.

When we transfer the change to those who will own it or maintain it moving forward, it is essential that we have trained them. It is also important to check in with them regularly to evaluate the change and ensure that it is successful for them. Don’t simply transfer the change to operations/maintenance and walk away assuming your work is done. You must regularly check in to reinforce the change and ensure it is successful over the long term.

## **Evaluating and Maintaining the Change**

Once you have transferred the change project to those individuals who will be owning (utilizing, managing, operating, and/or maintaining) the change moving forward, do the following:

*Evaluate the entire change initiative:* Get the group together who worked on the change initiative, along with key stakeholders, and evaluate the initiative. Ask the following 3 simple questions:

- What went well in launching, managing and transferring this change initiative?
- What could have been done better?
- What else should be shared so that future change projects are successful?

You want to capture these lessons learned to understand what might be done on future change projects to ensure they are successful. When change initiatives are successful, people are more apt to adapt to change more easily. They are confident in the change process overall.

*Develop a plan to maintain the change:* Have a plan in place to evaluate the change over time. This might be on a 6 month, 9 month and 12 month basis initially; and then annually or bi-annually after that. As with any process within an organization, regular evaluation is essential to ensure the process still meets the needs of the organization. As organizations change – they grow, new products and services are launched, new employees come on board, the client base grows, etc. – it is essential to evaluate processes to ensure that they are still beneficial, effective and help support the organization.

As goals and objectives of the organization change over time, processes must change to ensure the organization can meet those goals and objectives.