7 Change Management Strategies to Transform your Projects
Overview

The purpose of this presentation is to provide you an overview of:

- Where to start, and **how to answer stakeholder questions and concerns** about your change management strategy
- How to **frame and drive** change management as a project manager
- Key change management **strategies and tools**
- Change management in the **marketplace**
- What **skills and capabilities** you need to be a strong change manager
Answering key stakeholder questions

What is change management, and why do we need it for projects or transformations?

• Change management is the application of a structured process and set of tools for leading the people side of change to achieve a desired outcome*

• Here are key projects or transformations, and desired change outcomes:
  
  • **Post merger and/or acquisition integration** – building engagement and the desire to be a part of the newly merged / acquired organization
  
  • **Business process analysis and redesign** – awareness of a new process, and the knowledge and ability to use it
  
  • **Outsourcing and/or shared services** – awareness, knowledge, and ability to work in the new environment
  
  • **Technology implementation** – adoption and use of it by its stakeholders
  
  • **Operating model / Organization design & restructuring** - adoption and ownership of the new operating model / organization

* Prosci’s Change Management Website
Answering key stakeholder questions (cont’d)

Why is this important, and why should you care?

• Change management research has shown that projects with excellent change management effectiveness are 6 times more likely to meet or exceed project objectives*

• Regardless of the scale of change, applying a change management framework increases the probability of staying on schedule and budget, resulting in higher benefit realization and Return on Investment (ROI)*

* Prosci’s Change Management Website
**Answering key stakeholder questions (cont’d)**

What are the benefits of using a structured change management approach?

- Opportunity to set expectations about your new project or transformation
- Create and drive awareness, desire, and knowledge about your project
- Increase productivity
- Less resistance to your project or transformation
- Stay on budget and meet project deadlines
- Opportunity to clear up disconnects and misunderstandings between and among various stakeholders / groups
- Buy-in, commitment, and support for the project changes being implemented (including from your sponsors and executives)
1. The PMI NJ presentation
2. Change templates
3. A quick 15 min change management conversation with me

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7 Change Management Strategies to Transform your Projects

Fasten your seat belts!
#1 Lead with a change roadmap

<table>
<thead>
<tr>
<th>Timeframe* and Approach</th>
<th>Time 1</th>
<th>Time 2</th>
<th>Time 3</th>
<th>Time 4</th>
<th>Time 5</th>
<th>Time 6</th>
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<td>Assessment &amp; Feedback Report</td>
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<td>Change Strategy and Project Plan</td>
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<td>Project Announcement</td>
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<td>Special Topics</td>
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<td>Training</td>
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<td>Training Needs Assessment</td>
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<td>Develop Training</td>
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<td>Pilot Training</td>
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<td>Deliver Training</td>
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</table>

Change Champion Network

Change Impacts*

Change Champion Network Overview

Start / Kick Off

Pulse Check

Incorporate into Training & Comms

Post Go Live Pulse Check

Change Execution and Evaluation

* The timeframe could be quarters, months, weeks, and days depending your project

6/16/15
#2 Take advantage of assessment tool to customize your change plan

## Change Management Plan

<table>
<thead>
<tr>
<th>Status</th>
<th>Purpose / Message</th>
<th>Owner / Sender</th>
<th>Vehicle / Delivery Method</th>
<th>Audience</th>
<th>Timing / Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closed</td>
<td>Team Kick Off, and Meet &amp; Greet</td>
<td>Bill Bolbach</td>
<td>Group Meeting</td>
<td>Deepak Lalwani, Chris Mead, Iain Kinnis, E&amp;Y (C&amp;M)</td>
<td>Once, Mon, 5/11</td>
<td></td>
</tr>
<tr>
<td>Ongoing</td>
<td>Touchpoint Call - provide updates and check project status</td>
<td>Jeff Lennox (E&amp;Y)</td>
<td>Group Meeting</td>
<td>Bill Bolbach, Deepak Lalwani, Chris Mead, Iain Kinnis, E&amp;Y (C&amp;M)</td>
<td>Weekly, Every Thurs</td>
<td></td>
</tr>
<tr>
<td>Ongoing</td>
<td>Touchpoint Call (Optional) - provide updates and check project status</td>
<td>Jeff Lennox (E&amp;Y)</td>
<td>Group Meeting</td>
<td>Bill Bolbach, Deepak Lalwani, Chris Mead, Iain Kinnis, E&amp;Y (C&amp;M)</td>
<td>Weekly, Every Mon</td>
<td></td>
</tr>
<tr>
<td>Closed</td>
<td>Information Gathering - to assess current state and develop design options</td>
<td>E&amp;Y (C&amp;M)</td>
<td>Interview</td>
<td>Laura Barker</td>
<td>Once, Mon, 5/18</td>
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<tr>
<td>Closed</td>
<td>Information Gathering - to assess current state and develop design options</td>
<td>E&amp;Y (C&amp;M)</td>
<td>Interview</td>
<td>Vicki Jauron</td>
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<td>Interview</td>
<td>Mike Calviou</td>
<td>Once, Mon, 5/18</td>
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</tbody>
</table>

### Change Readiness Assessment

- **Process and Sub-Process Area**
  - Self Service / Change Business Title (MBT) and Change my business profile (CMB)
  - Self Service / Change Legal Name, Gender, COID, Member status, Citizenship and Nationality status, Manage Education, and ID
  - Self Service / Change My Photo, Change Preferred Name, Home, work, social network
  - Self Service / Change Personal Information – DOD, place of birth, dependents, spouse, military affiliation, disability, military service

- **Change Impact**
  - Change

- **Degree of Impact**
  - High, Medium, Low

- **Stakeholders Involved**
  - Employee, Manager, Employee, HRIS (HR Partner)

- **Engagement Opportunity**
  - Employee, HRIS (HR Partner)
#3 Use an assessment process to execute your assessment

## Data Gathering
- **Time 1**
  - **Activities**
    - Review and understand assessment needs
    - Design and develop your assessment tool
    - Create e-mail comm for sponsor
    - Conduct assessment w/ key stakeholders
  - **Expected Outcomes**
    - Collect stakeholder / change assessment data

## Stakeholder / Change Analysis
- **Time 2**
  - **Activities**
    - Analyze and summarize the data according to key themes
    - Further summarize the data according to strengths and opportunities
    - Design & develop feedback report for sponsors
  - **Expected Outcomes**
    - Design and develop feedback report and recommendations

## Feedback and Reporting
- **Time 3**
  - **Activities**
    - Deliver feedback report and results to sponsors
    - Create, discuss, and prioritize action plan with sponsors
  - **Expected Outcomes**
    - Feedback and report on strengths and opportunities
    - Create customized change management plan

## Change Plan & Implementation
- **Time 4**
  - **Activities**
    - Execute on your change management plan to include training and communication activities
  - **Expected Outcomes**
    - Implement the detailed change plan

### Activities
- **Sign-off & Approval**
  - **Project Managers and Sponsors**
  - **Checkpoint**

### Schedule
- **Time 1**: Project Managers and Sponsors
- **Time 2**: Project Managers and Sponsors
- **Time 3**: Project Managers and Sponsors
- **Time 4**: Project Managers and Sponsors

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6/16/15
The primary purpose of stakeholder analysis is to:

- Identify and describe key stakeholders impacted by your project or transformation
- Define their role, level of influence, and level of commitment
- Serve as an input to determine your change plan needs
Framework for Building Commitment

• To build commitment, each stakeholder typically goes through the phases below before internalizing change

• This happens by transitioning stakeholders up the curve

• The goal is to build Commitment for your project or transformation
### Stakeholder Analysis for your Project / Transformation

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Change Role</th>
<th>Level of Influence</th>
<th>Current Level of Commitment</th>
<th>Target Level of Commitment</th>
<th>Comm and Training Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Steering Committee</strong></td>
<td>XXXX</td>
<td>Sponsor</td>
<td>High</td>
<td>Understanding</td>
<td>Acceptance One on ones and/or presentation briefings</td>
</tr>
<tr>
<td></td>
<td>XXXX</td>
<td>Sponsor</td>
<td>High</td>
<td>Understanding</td>
<td>Acceptance In-person group meeting and/or video conference</td>
</tr>
<tr>
<td><strong>Project Team</strong></td>
<td>XXXX</td>
<td>Advocate</td>
<td>Medium</td>
<td>Acceptance</td>
<td>Commitment One on ones and/or groups meetings</td>
</tr>
<tr>
<td></td>
<td>XXXX</td>
<td>Advocate</td>
<td>Medium</td>
<td>Acceptance</td>
<td>Commitment Orientation / On-boarding training, project kick-off</td>
</tr>
<tr>
<td><strong>Impacted Department</strong></td>
<td>XXXX</td>
<td>Target</td>
<td>Low</td>
<td>Unaware</td>
<td>Acceptance Update to Company Intranet, Road show and /or FAQs</td>
</tr>
<tr>
<td></td>
<td>XXXX</td>
<td>Target</td>
<td>Low</td>
<td>Unaware</td>
<td>Acceptance Instructor-led training, job aid, and/or update role descriptions</td>
</tr>
</tbody>
</table>
Overview - Change Readiness Assessment

What is the Change Readiness Assessment?

Typically means using an interview or survey tool to measure attitude and behaviours across readiness factors:

• Managing Project Changes
• Training
• Communication
• Leadership and Sponsorship
• Engagement

Why is it important, and what are the key benefits?

• Understanding these factors as it relates to past changes is key to developing a customized plan
• Data better enables employees to accept and own change as an output from your project or transformation

Uncovering attitudes toward past changes can be leveraged in your change plan!
Reinforce your strengths:

- 14 out of 15 of those interviewed mentioned that they want to provide support and feedback as it speaks to the transformation…

Take advantage of the opportunities:

- In general, leaders and employees could use more communication about…
- We need to communicate the ‘What’s In It For Me’ (WIIFM), and how it makes our job easier…
- Develop and deliver communication and training that answers key questions that are on our employees mind, and what’s important to them…
- Use effective methods such as conference call meetings to get key messages out to the business…
- Webinars in other parts of the business can also be very effective…
- Be mindful of the timing of the roll-out…
Feedback and Reporting to customize Change Plan (Survey)

Are my colleagues and I ready for the new outsourced environment?

Reinforce your strengths:

• Are confident they have the experience and ability at Company X to implement the Outsourcing project successfully (4.17)

• Believe their managers and leadership team openly advocate for the Outsourcing project and its success (4.01)

----------------------------------------------- Average 3.89

Take advantage of the opportunities for improvement:

• Feel they understand the impacts and outcomes when they discuss the change (3.78)

• Believe they are ready to make the change to the new Outsourced environment (3.76)

• Feel they have appropriate communication and support to help them understand the change (3.74)
Overview – Change Impact Analysis

A change impact analysis is conducted in order to:

• Understand the gap between current and future state processes

• Understand which stakeholders / roles will be impacted

• Understand the degree to which changes will have an impact on a group of stakeholders / roles

Key Findings and Results

• Data by Process Areas

• Data by Stakeholders / Roles

• Data by Change Tools

The impact analysis will allow you to prioritize training and communication based on identifying your degree of impact.
Change Impact Analysis - Data Gathering

1. **Describe the Change** in the text box, (if needed)
2. Click on the drop down menu under **Primary Area** to select one process / functional area.
3. Check one or more buttons to **Identify whose Impacted**
4. **Select the Degree of Impact**
5. Check one or more buttons to identify a **Recommended Method of Addressing**
## Change Impact Analysis from Database

<table>
<thead>
<tr>
<th>Primary Area</th>
<th>Describe the Change</th>
<th>Describe Who Is Impacted</th>
<th>Degree of Impact</th>
<th>Method of Addressing</th>
</tr>
</thead>
<tbody>
<tr>
<td>H-HCM</td>
<td>Manager Self-Service will enable managers to complete more transactions in the system rather than relying on HR to own the transactions. Extensive training will be required to equip managers…</td>
<td>Managers</td>
<td>3 - High</td>
<td>Communications, Training</td>
</tr>
<tr>
<td>S-HR Shared Serv</td>
<td>Changing banking relationship this summer from Citizens to PNC; this is an enormous change for the field…</td>
<td>HR Shared Services</td>
<td>2 - Medium</td>
<td>Communications</td>
</tr>
<tr>
<td>A-Absence</td>
<td>Balances for employees will now be available in technology since they will be loaded into the system from external sources…</td>
<td>Employees, Managers</td>
<td>1 - Low</td>
<td>Communications, Training</td>
</tr>
</tbody>
</table>
Based on the change impact data, here’s what we recommend:

- Focus your change interventions on primary process areas such as...
- When customizing training, closer attention should be paid to...
- Tailor your communications to key stakeholders / roles including...
- Change interventions that should be used the most...
Assessment tools frame and drive your Change Management Plan

Assessment tools provides critical information that will serve as an input into your change management plan by answering the questions below.

- **Who?**
  - Who are the stakeholders involved in the change at this point?

- **Where?**
  - Where are they with this change in terms of their commitment, their readiness, the degree of impact?

- **Why?**
  - Why is this important, and why are you interested?

- **What?**
  - What are the key messages?

- **How?**
  - How do I reach out to our stakeholders? Or what communication and/or training vehicles do they prefer?

- **When?**
  - When, or at point does it make sense to communicate and/or train our stakeholders?
#4 Introduce a Change Champion Network (Change Agent Network)

The Change Champion Network is:

- A network of respected individuals who are able to represent their **business area**, and serve as **liaisons** with the change team to:
  - Actively engage the business
  - Support readiness and outreach activities
  - Drive adoption

**Change Champion Leads**

- Partners with change team to deliver Change Plan activities at the **local** level
- Actively engages the business community to **build awareness, gather feedback, and identify areas of resistance**
- Adapts to changes and helps others to do the same; **leads by example**
- Provides **direction** to the Change Champions

**Change Champions**

- Assists the Change Champion Leads in the **execution of engagement, communication, and training activities**

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**Core Change Management Team**

- Establishes change approach
- Provides direction and information
- Provides feedback
- Shares ideas and concerns

**Change Agent Network**

- Line of Bus A
  - Lead
  - Change Champion
- Line of Bus B
  - Lead
  - Change Champion
- Line of Bus C
  - Lead
  - Change Champion
#5 Define and leverage a Communication Approach and Process

At a high-level, the communication process will consist of the following phases, beginning from the top of the diagram.
## Key Stakeholders and Communication Deliverables

<table>
<thead>
<tr>
<th>Deliverables</th>
<th>Stakeholders</th>
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<tbody>
<tr>
<td></td>
<td>Management</td>
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<tr>
<td><strong>Project Announcement</strong></td>
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<tr>
<td>• Launch project</td>
<td>✓</td>
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<tr>
<td>• Establish foundation for future comms</td>
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<tr>
<td>• Elevator Speech</td>
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<tr>
<td><strong>Project Messaging</strong></td>
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<tr>
<td>• Promote awareness and highlight case for change</td>
<td>✓</td>
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<td><strong>Special Topics</strong></td>
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<tr>
<td>• Build understanding about what’s changing</td>
<td>✓</td>
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<tr>
<td><strong>Start-Stop Announcements</strong></td>
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<tr>
<td>• Announce start-stop dates over a series of communications</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Go Live Announcement</strong></td>
<td></td>
</tr>
<tr>
<td>• Announce the Go Live and celebrate success</td>
<td>✓</td>
</tr>
</tbody>
</table>
#6 Build and leverage a Training Approach and Process

At a high-level, the training approach will consist of the following phases, beginning from the top of the diagram.

- Needs Analysis and Planning
- Training Design
- Training Evaluation
- Training Delivery
- Training Material Development

Diagram:

```
Needs Analysis and Planning → Training Design
Training Design → Training Evaluation
Training Evaluation → Training Delivery
Training Delivery → Training Material Development
Training Material Development → Needs Analysis and Planning
```

Diagram Source: [Diagram Image]
Change management in the marketplace

When deciding on Change Management services and tools, organizations can generally choose from:

- Developing and applying your own Change Management methodology
- Using Off-the-shelf Change Management tools to apply to your projects
- Engaging a consulting firm which offers Change Management services

Companies actively offering Change Management services include:
- Large and small consulting firms
- Higher education institutions
- Business certification organizations including change management associations

One of the market’s first global association for Change Management practitioners, is the Association of Change Management Professionals (ACMP). ACMP is a leading resource for access to change management education, information, and networking. For more information about ACMP, click here.
Defining the relationship between change management and project management

Overall effectiveness of change management program

Percent of respondents that met or exceeded project objectives

- Poor (n=111): 16%
- Fair (n=259): 51%
- Good (n=313): 80%
- Excellent (n=65): 95%

#7 Project management provides a great foundation for change management

- Creating Governance
- Setting Direction
- Initiating Structure / Organizing Work
- Excellent Facilitation / Presentation Skills
- Strong Communication Skills
- Being Proactive / Taking Initiative
- Having Drive
- Being Resilient
- Managing Risks
- Being Results - Oriented

*These skills and capabilities are key for being a strong change manager!*
1. Lead with a change roadmap

2. Take advantage of an assessment tool to customize your change plan

3. Use an assessment process to execute your assessment

4. Introduce a Change Champion Network (Change Agent Network)

5. Define and leverage a Communication Approach and Process

6. Build and leverage a Training Approach and Process

7. Project management provides a great foundation for change management

Summary –
7 Change Management Strategies to Transform your Tech Projects
1. The PMI NJ presentation
2. Change templates
3. A quick 15 min change management conversation with me

Visit - lalwani.leadpages.net/pmi
Deepak Lalwani has been working as a change management and business transformation professional for 15 years. His experience includes working as a management consultant at Accenture as part of their Talent & Organization Performance practice. He also worked at Carlisle & Gallagher Consulting Group, a mid-sized management & technology consultancy voted Top 10 Best Places to Work for in 2014 by Consulting Magazine. His work included creating the People & Organizational Change practice during his time there.

Prior to that, he’s worked as an internal consultant and manager at two Fortune 500 companies to include National Grid and Anthem (WellPoint – Empire BlueCross BlueShield). His client have included Mondelez International, Pfizer, MasterCard, JPMorgan Chase, American Express, the Hartford Financial Group, Barclays Capital (Lehman Brothers), EMC, the US Army, AllianceBernstein, the New York City Housing Authority, Interfaith Neighbors, CIBC World Markets, Deutsche Bank, MetLife, and Avon Products. He’s also the founder and host of an Information Technology - Small Medium Business ‘meetup’ called IT SMB. For more information, please visit: www.meetup.com/it-smb-meetup.

As for his educational background, he graduated with a Masters degree specializing in Organizational Change from Columbia University. He’s also taught Management at New York University (NYU). For more about him, please visit www.linkedin.com/in/deepaklalwani. To reach him directly, please feel free to e-mail him at deepak.lalwani629@gmail.com.