

PERSPECTIVE

A man with a beard, wearing a blue shirt, is looking out from a high-rise building. The building's glass and metal structure is visible, and the background shows a blue sky with white clouds.

CHANGES EVERYTHING.

Navigating Uncertainty in a Changing World

WIPFLI

Presenters



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Childless Cat Lady



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Mental Health Awareness Advocate

Recovering People Pleaser

Musician

What to expect in today's session:

- As a group, we will review key concepts of **change readiness, change management, and change leadership**.
- We will work together to build skills to manage crucial conversations, while acknowledging the importance of **mental wellness** in our workplace.
- We will breakout in smaller groups throughout the morning. We encourage you to be **active in your discussions** to make the most of our time together.
- We will regroup at the end of each breakout session for reflection and to ensure that you are equipped with the **resources you need** to lead in challenging times.
- Everything we review as well as bonus material to take back to your organization and team will be **available to you**.

A heads-up

- In this discussion today, we will be delving into some deep topics related to mental wellness and burnout.
- If at any point this is not the right content for you, you are more than welcome to exit without judgement. You can come back whenever you want as well.
- Emotions are also welcome in this space :)

Before we start- Let's take 2 minutes ...

- In a digital notepad on phone or physical pad
 - Write down thoughts going through your mind
 - Give yourself permission to keep them in that spot until the end of the session or maybe until you leave this conference...
 - This will allow you to focus on yourself throughout this session :)

Why leaders start with why video



Individual Exercise: Discover Your Why



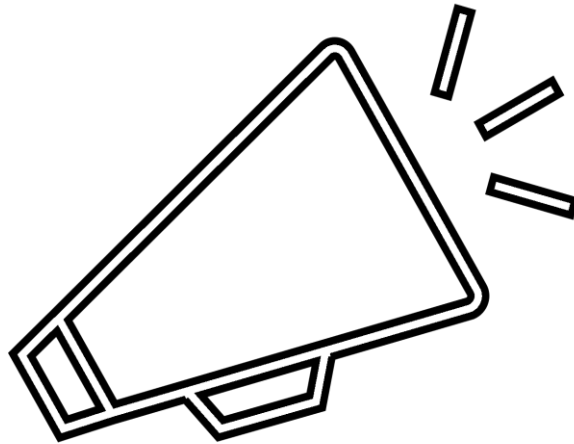
Why did you choose to work for your organization?

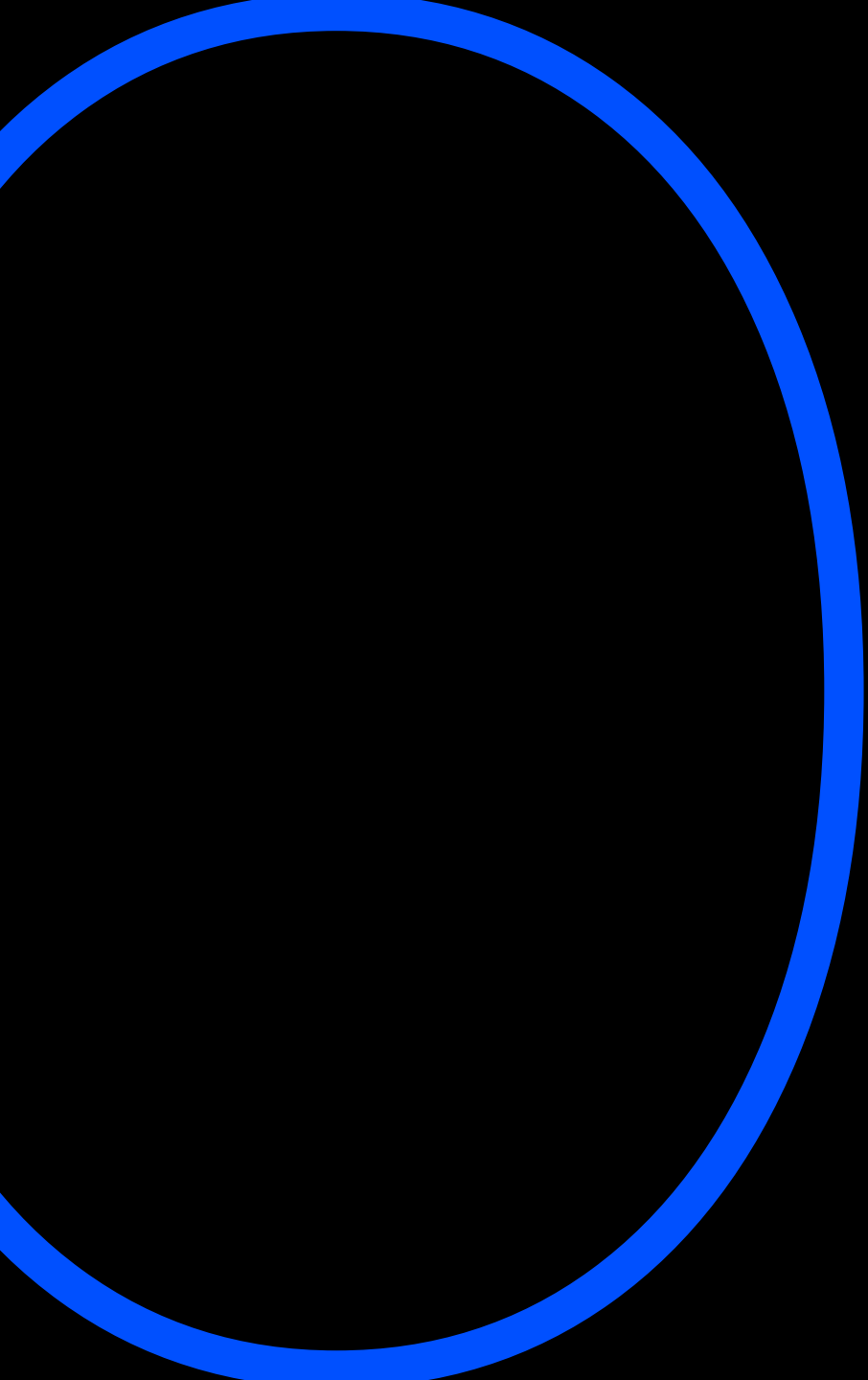


Why regardless of how long you've been at your organization are you still committed to them?

- **There are no right or wrong answers.**
 - ▶ The point of this activity is to get your mind thinking more broadly about your why in relation to your work
 - ▶ Take 2 minutes to jot down your thoughts
 - ▶ Save these notes for later

Let's Share!





Opening Discussion:
**How we deal with
change**

How are you feeling today?



Head to Menti.com



Would you prefer to focus
more on change
management or mental
wellness today?



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When you think of
change, especially work-
related changes, what
comes to mind?



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How does work related
change make you
feel?



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If you had the chance to respond to a work-related change differently (a 'do-over'), what would you do differently?



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**Change
Management
Fundamentals**

What is Change Management?



Change Management is the *process, tools, and techniques* to manage the people side of change to ***achieve the needed results.***



“Change has a bad reputation in our society. But it isn’t all bad – not by any means. In fact, change is necessary in life – to keep us moving, to keep us growing, to keep us interested. Imagine life without change. It will be static, boring, dull.”

Dr. Dennis O’Grady

**Opening
reflection –**

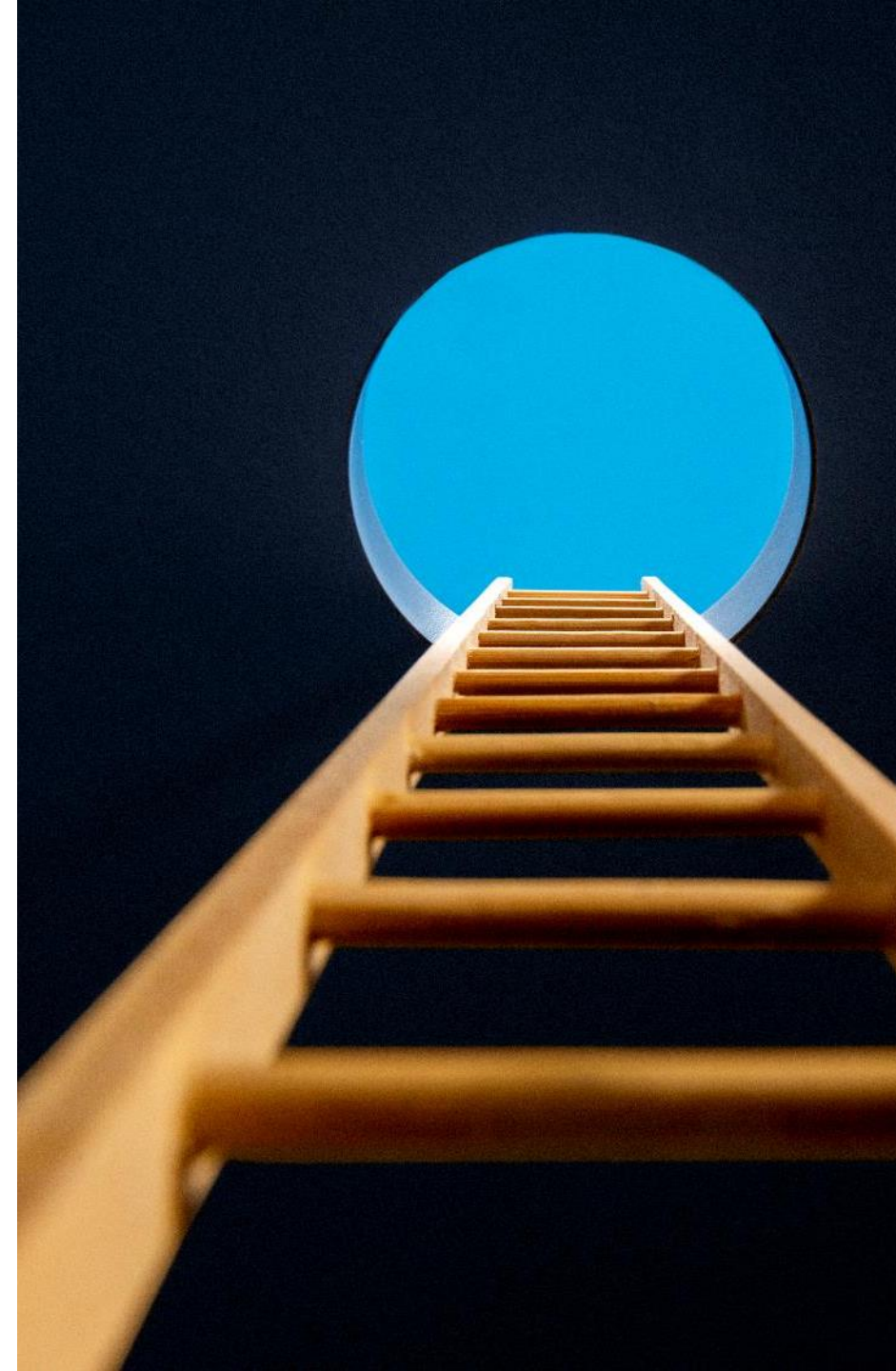
**Discussion at
your table**

What is one change you recently made,
personally or professionally?

What made the change challenging or
successful?

Why is Change Management important?

- Manage passive & active resistance
- Increase probability of success
- Reduce transition time
- Eliminate desire to revert/ find workarounds
- Maintain trust
- Retain valued employees



The reality of organizational initiatives

Resistance

- Research and experience show that change initiatives fall short of expectations because the people component of change is mismanaged. **People's resistance to change is discounted.**

Barriers to success

- “According to an IBM study, **only 40%** of projects meet schedule, budget, and quality goals. Further, they found that the biggest barriers to success are **people factors**.”

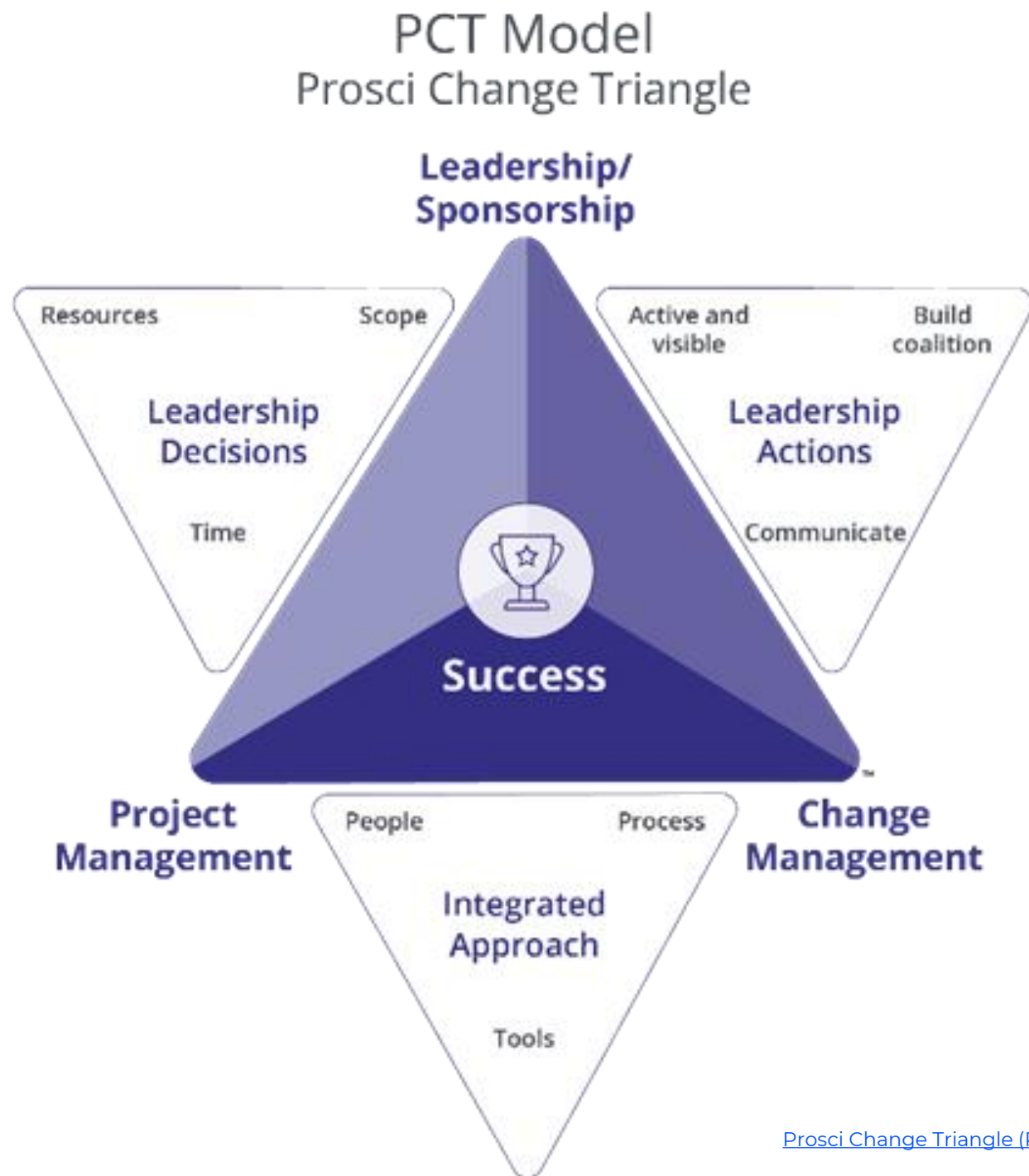
Falling short

- “According to a Harvard eLearning alert, **70% of all initiatives fail** to fully meet objectives.”

Jeopardizing ROI

- “According to a McKinsey study, on average, large IT projects run **45 percent over budget** and 7 percent over time, while delivering 56 percent less value than predicted.”

Leading and managing change



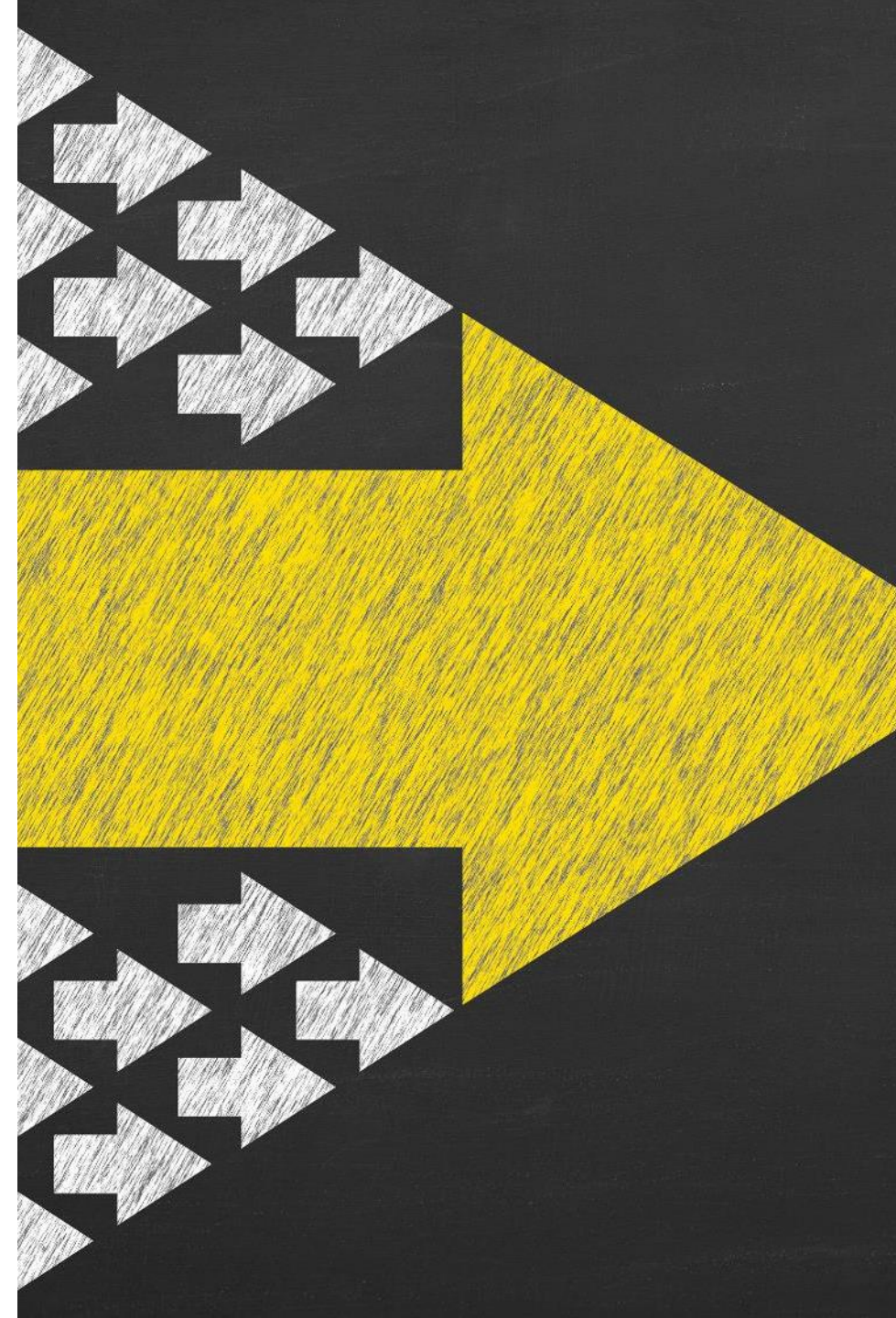
When organizations do this poorly:

- Employees approach future changes with suspicion and cynicism
- Managers feel betrayed by the company and management
- Leadership blames “resistance to change”...real resistance is never dealt with and lingers within the organization
- Momentum dies off without achieving objectives



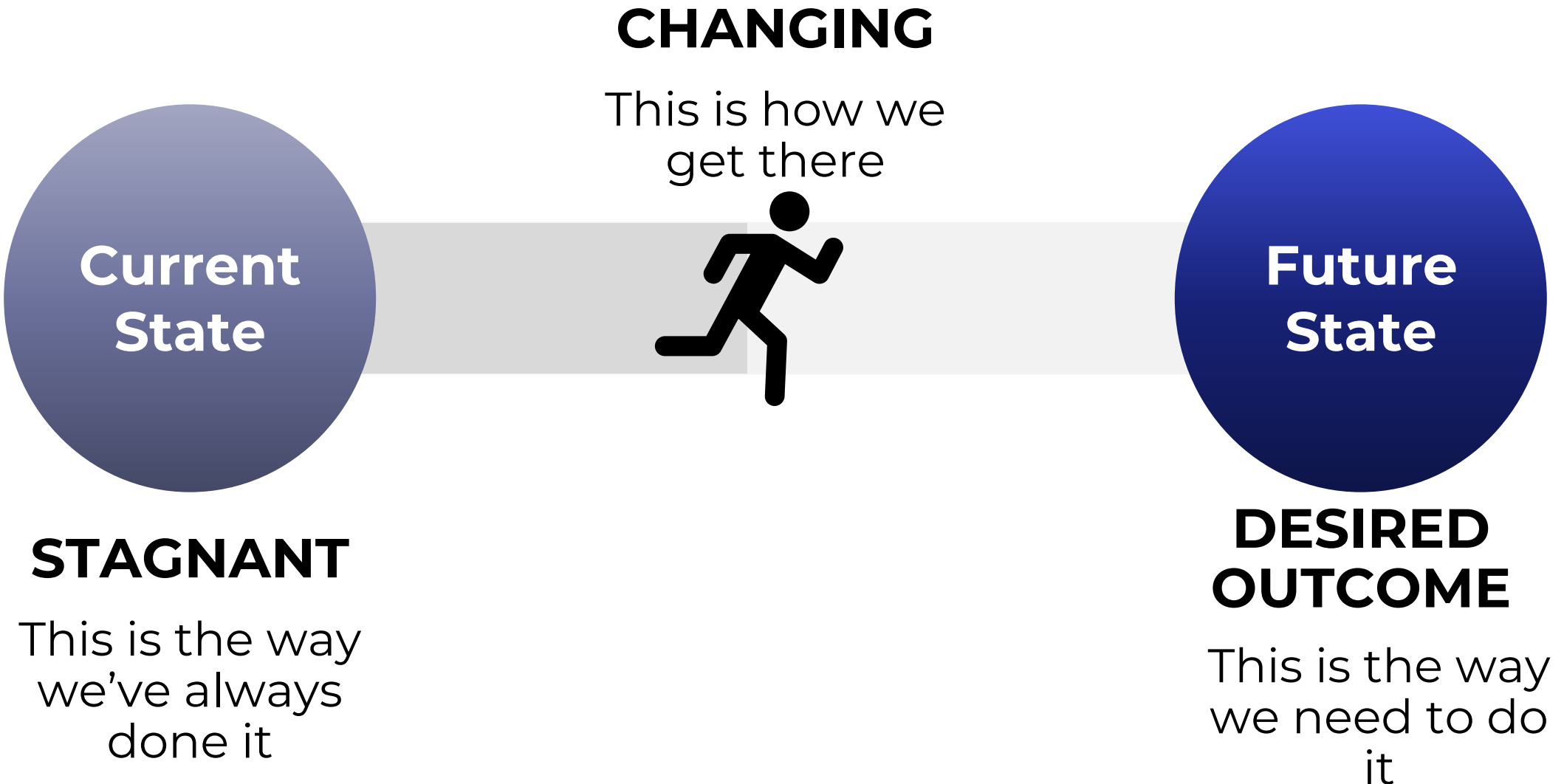
When organizations do this well:

- Employees approach future changes with optimism and enthusiasm
- Managers believe leadership and the company care about their futures and value their contributions
- Leadership feels satisfied about the initiative – they can see how the change is making them successful
- Results come faster and exceed expectations

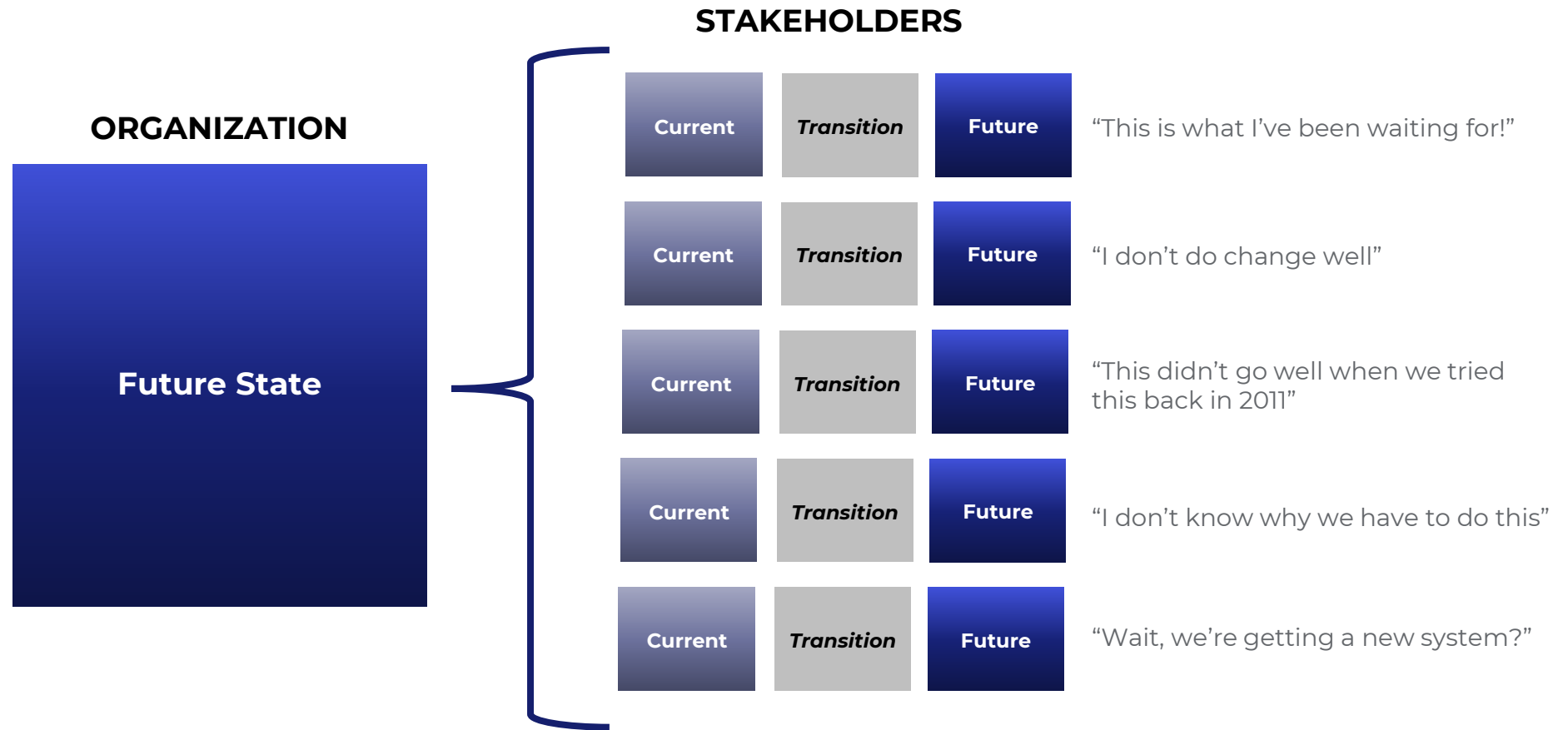


What is change?

What is change?

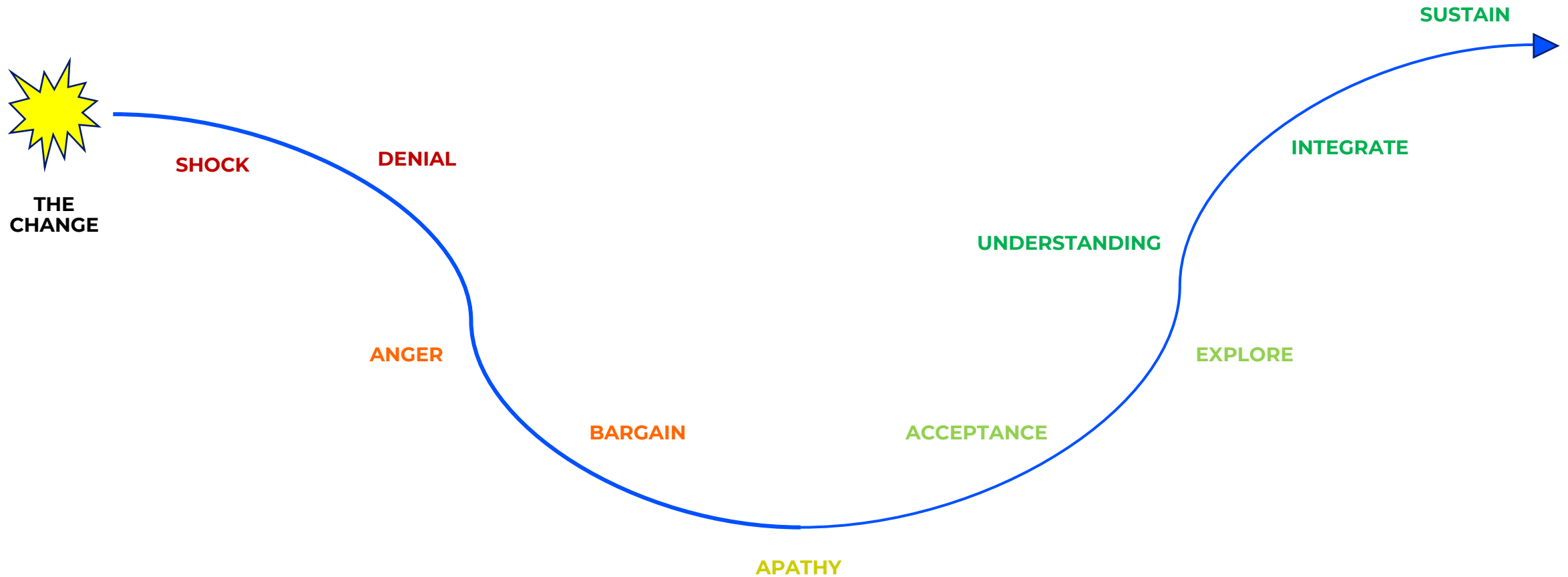


Change: A one-to-many relationship



The organization's future state is the collection of many individual future states.

The Change Curve: Understanding the different stages



Applying change management



At an organizational level

- Applying a structured change management approach or framework
- Engaging sponsors in the process of change

1

PREPARING FOR CHANGE

Build a foundation for managing change. Examine theories and perspectives that impact how people go through changes. Assess your specific change characteristics and the organizational attributes that impact change management. Develop your team structure and sponsorship model.

2

MANAGING CHANGE

Develop key change management plans: communications, sponsorship, coaching, training, resistance management. Create a project plan for implementing change management activities and learn how to use the Prosci ADKAR Model.

3

REINFORCING CHANGE

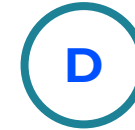
Assess the effectiveness of change management activities. Identify and overcome obstacles. Build buy-in and celebrate successes.

At an individual level

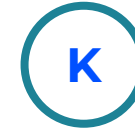
- Building managers and supervisors that are change competent
- Equipping employees to understand the emotional and technical impacts of change



Awareness



Desire



Knowledge

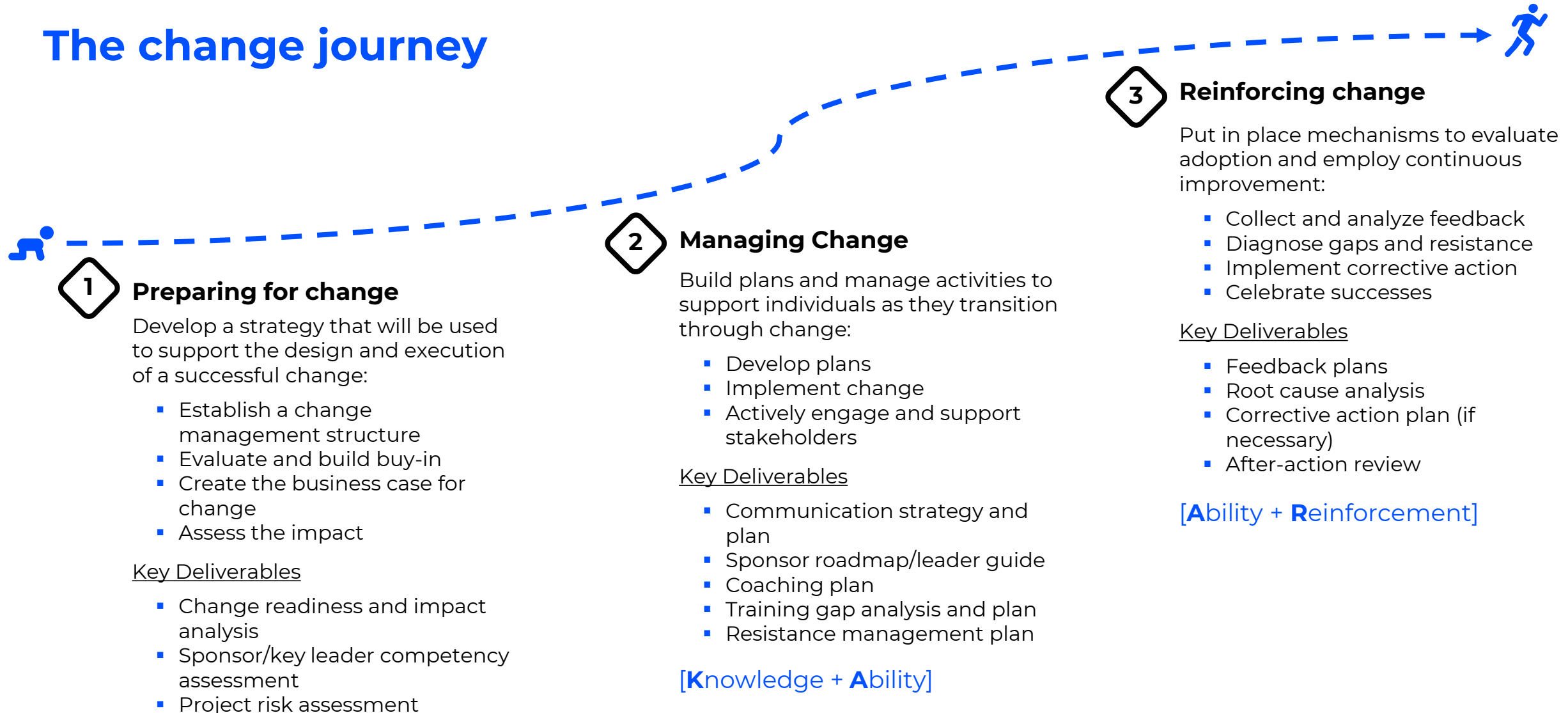


Ability



Reinforcement®

The change journey



OS

**Key Change
Management Tools**



Change Readiness Assessment

Assessing THE change

The assessment is essential to plan your change strategy and how you plan your project implementation.

This assessment examines the scope, depth and overall size of the change, and addresses:

- Scope of the change (workgroup, department, division, enterprise)
- Number of employees impacted
- Type of change (process, technology, organization, job roles, merger, strategy)
- Amount of change from where we are today – how far are we going?

Focus areas when assessing the specific change

- Scope of change(s)
- Number of employees affected
- Type of change(s)
- Degree of process change(s)
- Degree of technology and system change(s)
- Degree of job role change(s)
- Degree of organization restructuring
- Amount of change overall
- Impact on employee compensation
- Reduction in total staffing levels
- Timeframe for change





Assessing the
organization

Assessing the organization

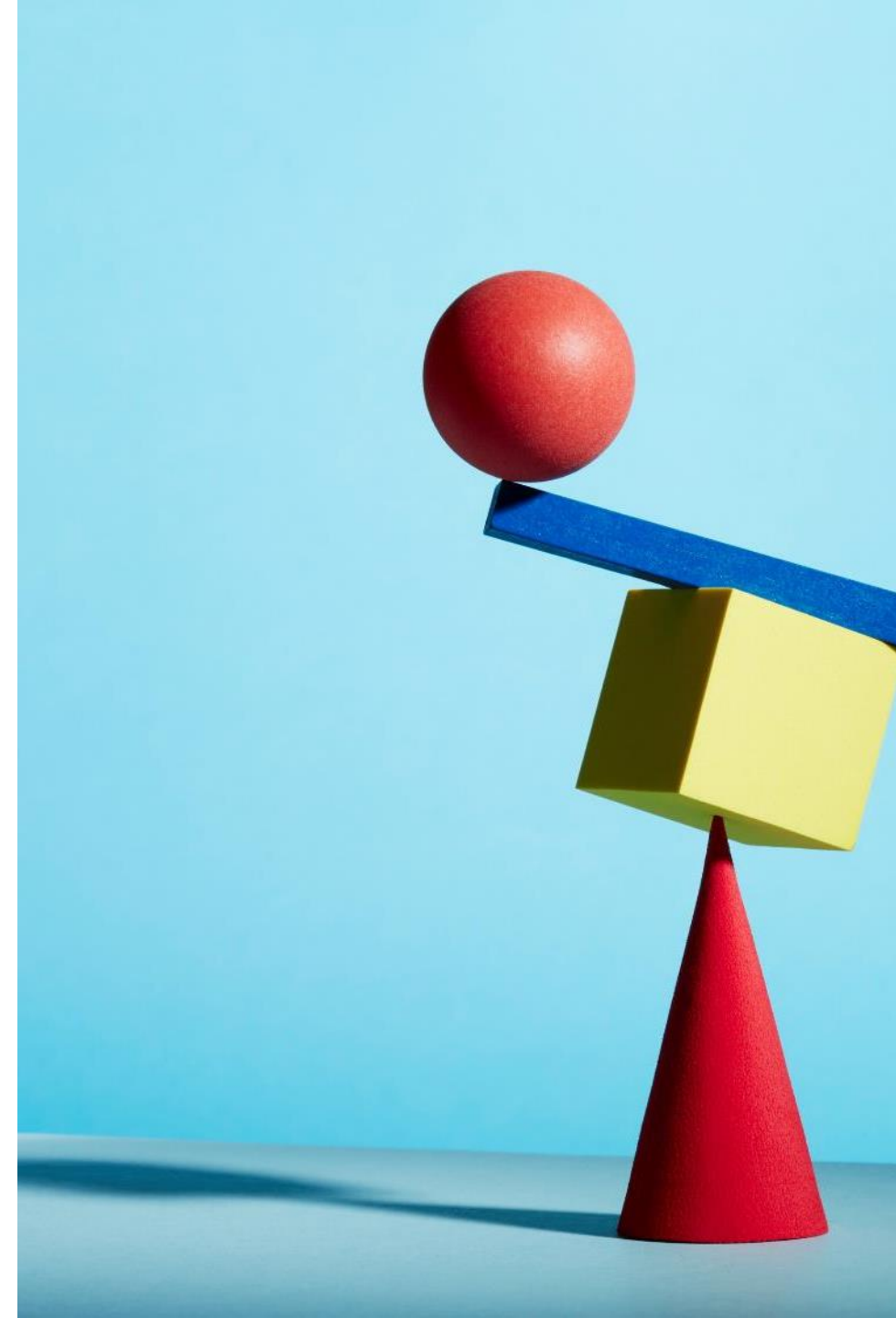
Understanding your organization's unique attributes will enable you to educate your team and sponsors about potential obstacles.

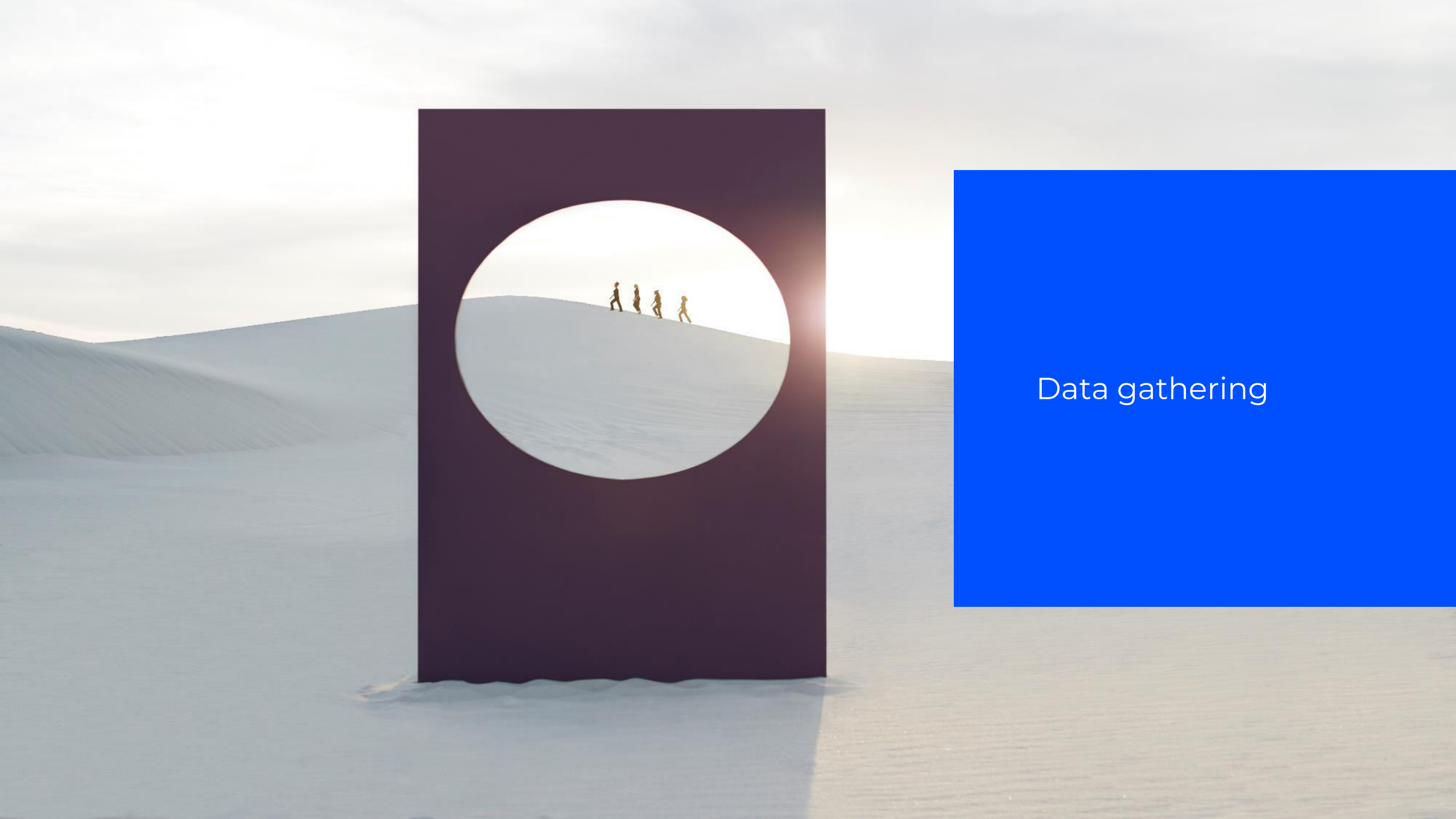
This assessment covers:

- Culture and value system
- Capacity for change (and how much change is already taking place)
- Leadership styles and power distribution
- Residual effects of past changes
- Middle management's predisposition toward the change
- Employee readiness for change

Organizational change risk assessment focus

- Perceived need for change among employees and managers
- Impact of past changes on employees
- Change capacity
- Past changes
- Shared vision and direction for the organization
- Resources and funding availability
- Organization's culture around change
- Organizational reinforcement
- Leadership style and power distribution
- Senior management change competency
- Middle management change competency
- Employee change competency





Data gathering

Collecting employee data

Execute employee data-gathering carefully.

In many cases, simply asking employees these questions creates fear and uncertainty. Confirm that your project team and senior leadership are ready to respond to the questions that naturally arise when change is on the horizon.

When collecting data, three areas are important:

- Employee perceptions of the organization's readiness for change
- Employee personal readiness for change in general
- Employee understanding of the change itself and how they perceive the personal impact of that change

Statements to rate how employees perceive the change and its impact on them personally

- *The change supports my professional career plans and goals.*
- *The change will improve my financial position.*
- *I will not have to relocate to support this change.*
- *I do not view my job as at risk with this change.*
- *This change would ultimately benefit my family.*
- *I am confident that I can learn the new skills and behaviors to perform my job.*
- *The change will not adversely affect my health.*
- *The change will result in a more enjoyable work environment.*



Change readiness
assessment results



Reporting on readiness

- The assessment process is a planning aid and not the bulk of the change management effort.
- As tools that help your team plan for the change, assessments should consume minimal time—just enough to inform good planning decisions.
- Reports can be simple, easy to consume, and short
- Hold back from over-presenting data or detail
- Maintain confidentiality



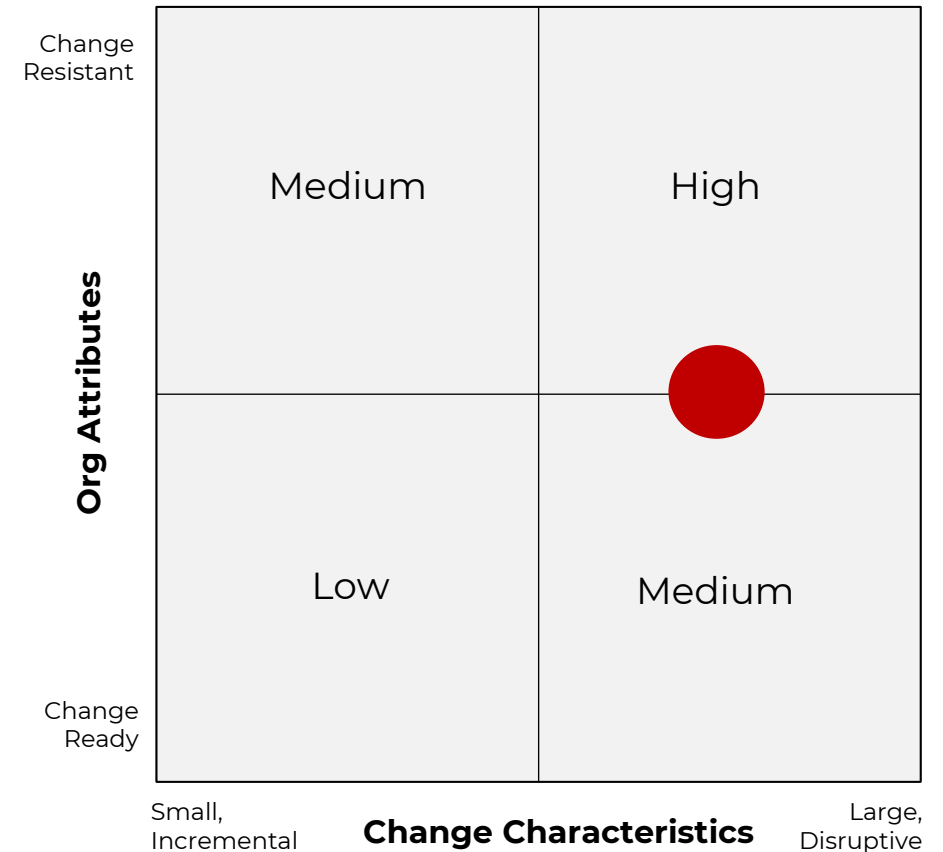
Example: Readiness results summary

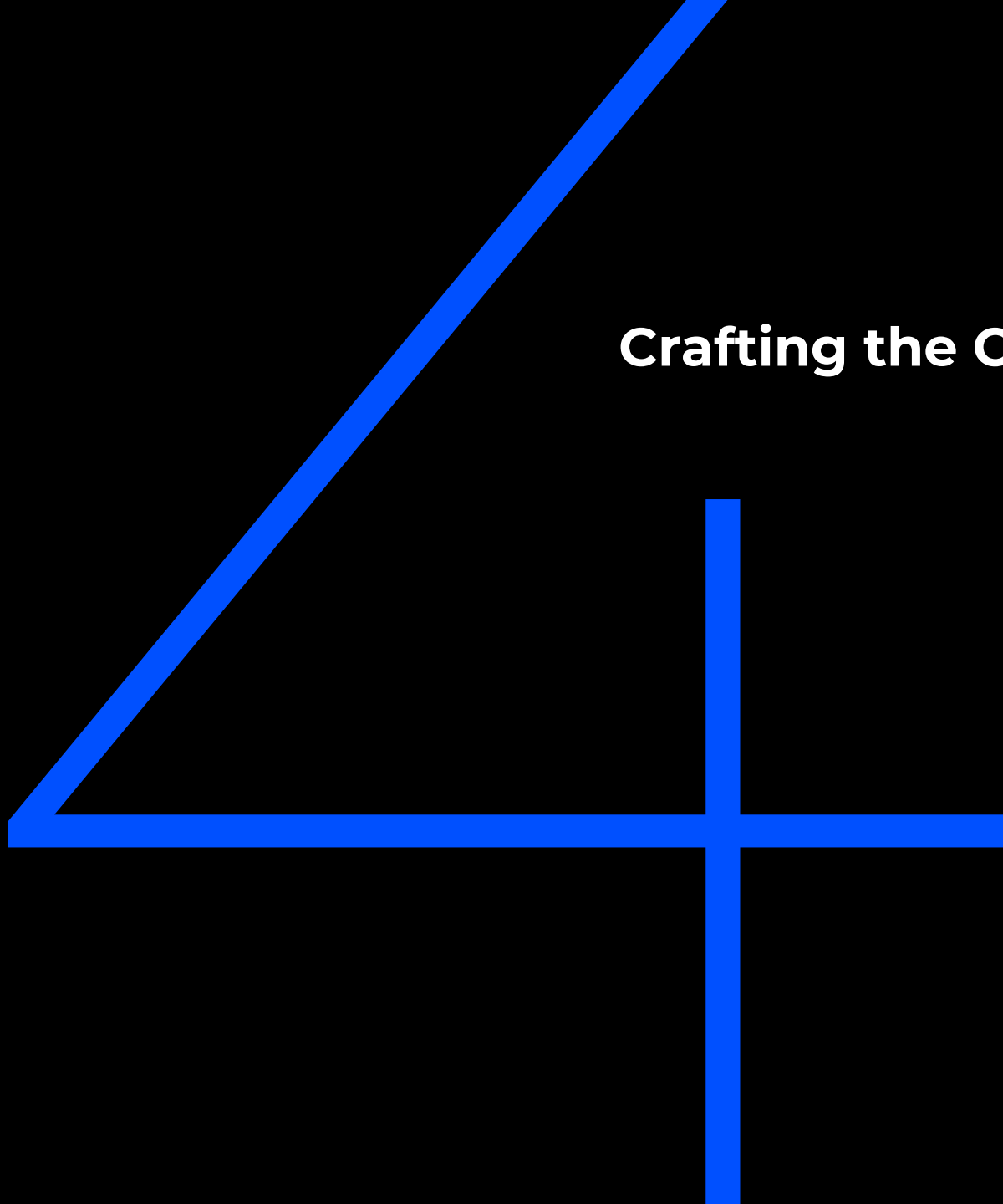
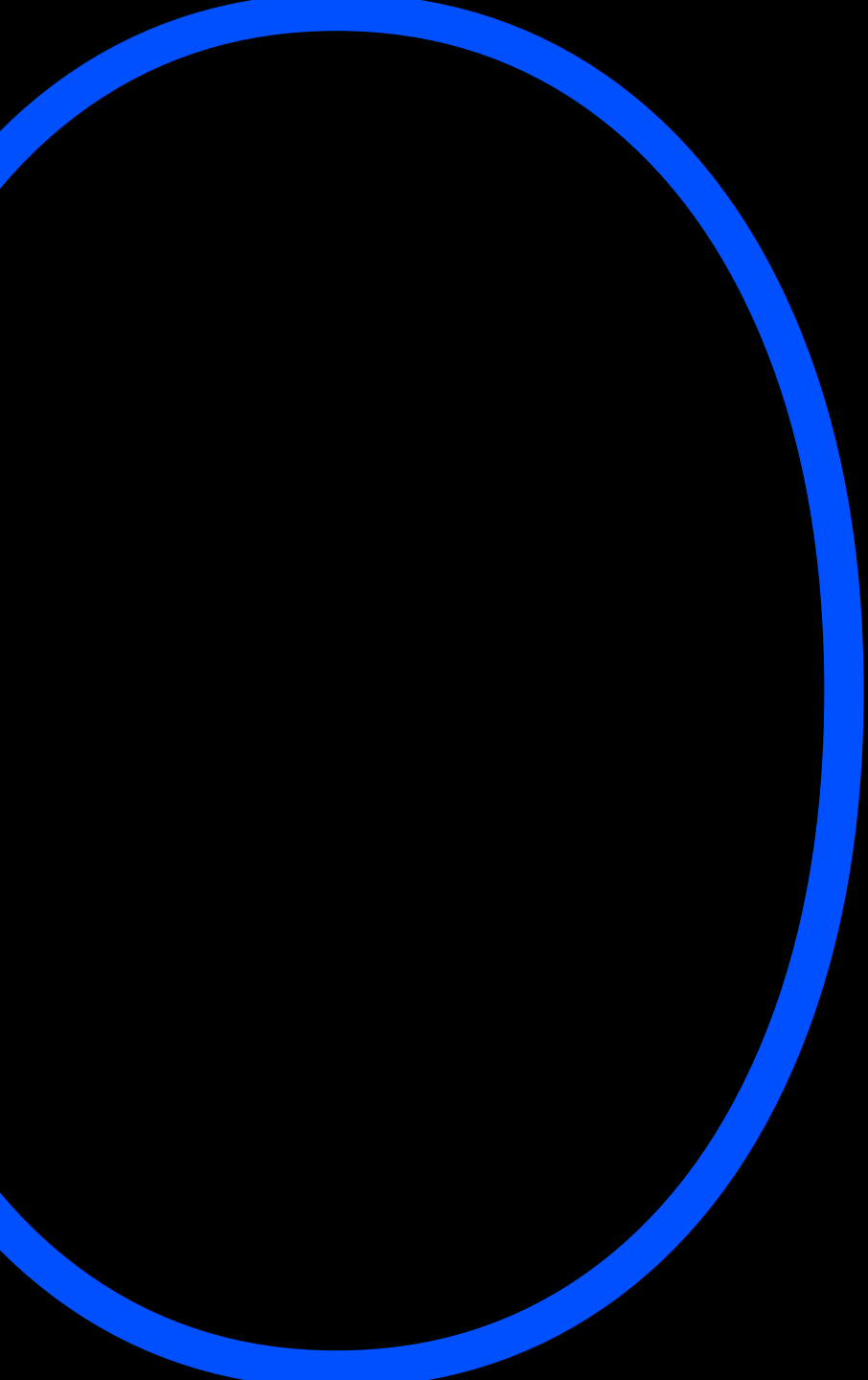
Change Readiness is measured on two indexes:

- Change characteristics
- Organizational attributes

Initial assessments and discussions around ABC change readiness identified the following risks:

- Changes must make the “Top 10 Priorities List” to get attention and focus from leaders within ABCD, or risk failed implementation
- Attributes of agility and adaptability to change within the WXY organization; however, they may not have the same positive impact on internal projects (they have a production focus)
- While there is a compelling business case at the ABCD enterprise-level, this project may be difficult to generate personal buy-in





**Crafting the Change
Story**



How have you communicated with your teams about change?

What worked best? Was it as effective as you'd expected it to be?



How do you talk about
change?

A person wearing a blue patterned shirt is holding a black pen and a clipboard. The image is partially obscured by a solid blue rectangle on the left side, which contains the text "What is a change story?".

What is a change story?

People tell stories

- We are storytellers, that's just human nature
- In the absence of information, people will begin to fill in the blanks with their own stories
- Providing accurate, useful information as soon as possible helps to diminish the power of the 'rumor mill'



What is a change story?



A quick reference guide and a single source of truth



A place to find important background information, important dates, etc.



A way to consistently explain the benefits of a project at a high level



A tool to help leaders and change sponsors communicate in the early stages of a project, as well as later should timelines change



Part of the tools provided to your change network to assist in answering questions and managing concerns with the change



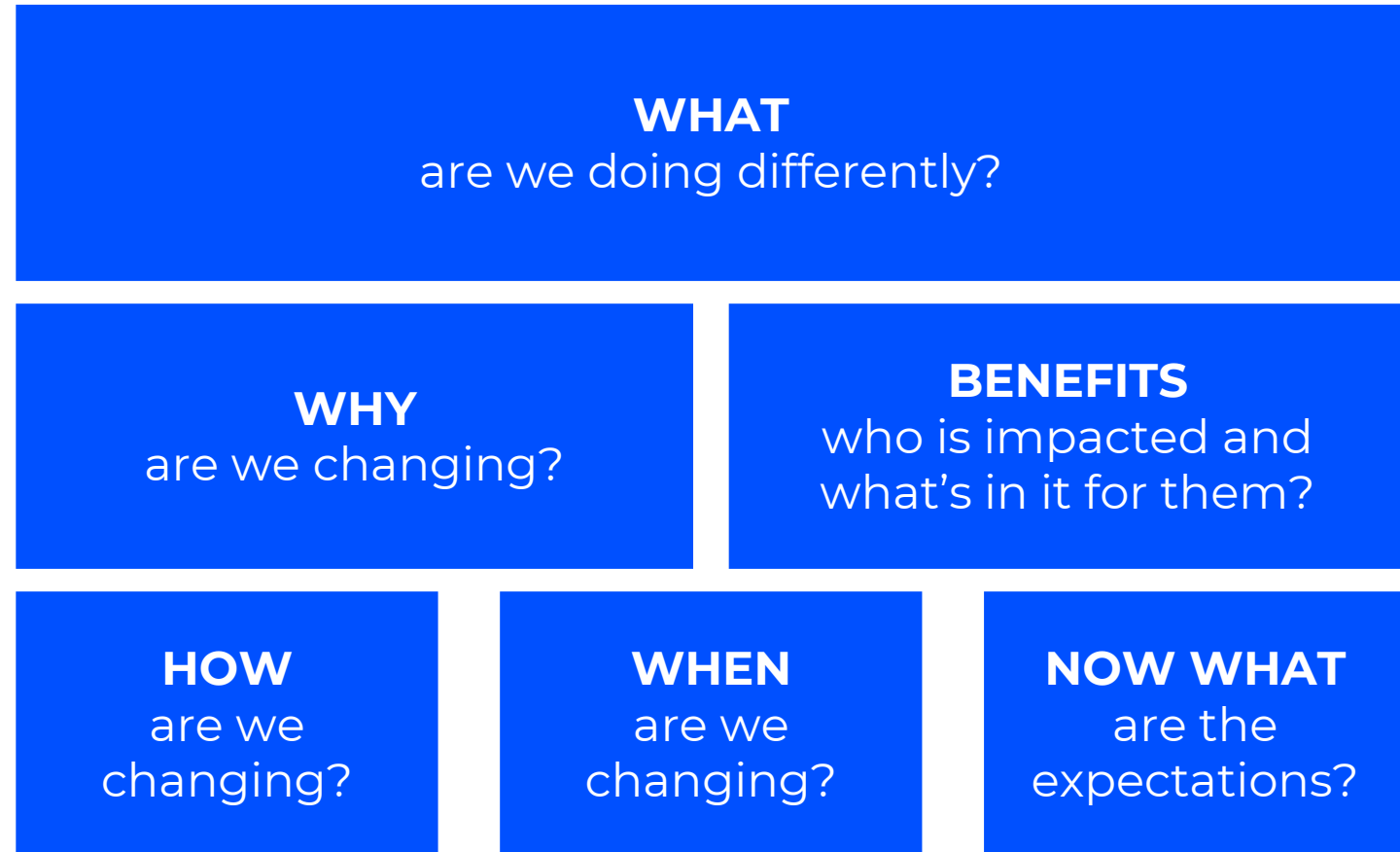
Something that can be adopted into the way your organization manages changes in the future, becoming an expectation of staff and a boost in project credibility

What a change story is not...

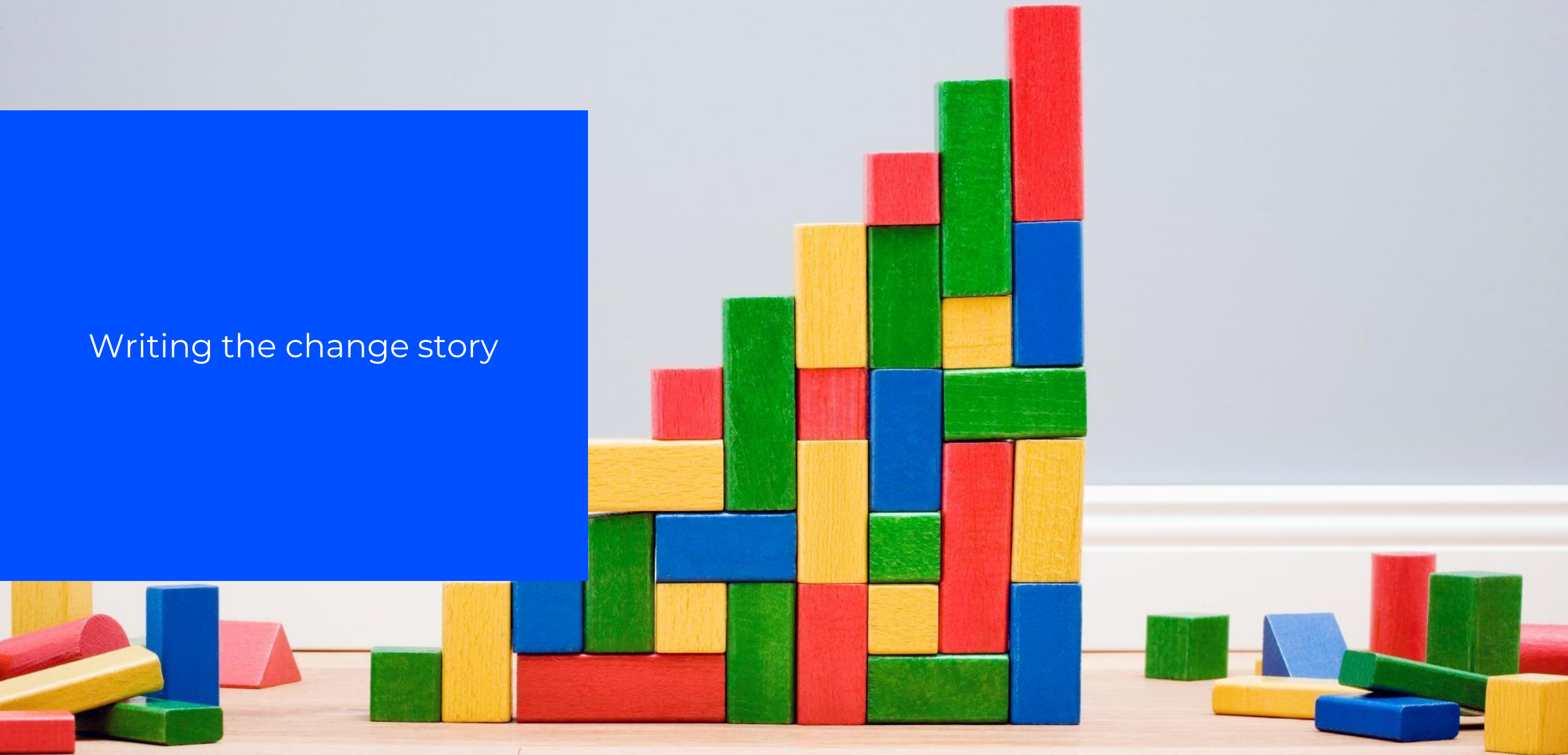
A document to be shared with the whole organization as a 'stand-alone' communication message.

Something completed at the beginning of the project and left 'as-is', it must be updated periodically as things change.

Building your change story



Writing the change story



Editing and composition

With the information defined by the change team in the first parts of this process, most groups will have more than they can fit on one page.

The challenge is to pare down the input to the essential facts and get the information onto **one sheet** – it can be done!

Often the process of editing and formatting helps create initial communication priorities, driving home the question **“What do we really need to make sure people know about this change/project?”**



Here's an example of a Change Story

X Y Z System (XYZS)

Changing the way we work and manage in Alpha Bravo Company!

What

- One national volunteer database for all programs and partners (consolidation of multiple databases nationally).
- Standard policies and procedures for credentialing and engagement of volunteer team members
- Optimization of the national database
- Changing the way volunteers interact with the organization (new volunteer portal experience)

Why

- Our current mission placement process is sometimes inefficient, opaque and lacks equity across different countries.
- Our ability to assess and optimize skill sets across a national volunteer base impacts adherence with national standards of care.
- The quality of the volunteer experience is inconsistent across states and specialties impacting volunteer satisfaction.
- The volume and diversity of our volunteer base is challenging to manage with our current technology and processes.
- Lack of visibility and analytics into current volunteer base impacts future program planning.

Benefits

Customer/Volunteer Benefits

- Increased volunteer satisfaction and smoother volunteer experience
- Enhanced communications with Alpha Bravo
- Clear visibility into their volunteer role and how to grow within the organization

Employee Benefits

- Staff time saved and increased productivity
- Central repository of data
- Building better teams of volunteers to meet program needs
- Ability to track and evaluate volunteers

Organizational Benefits

- Other departments able to utilize volunteer data to improve their business functions
- Stronger programs
- Stronger data to drive decision-making and reporting
- Stronger relationships between ABC and foundation staff

How

- This is a three phased project, with first year concentrating on Phase 1.0 core needs and one national system.
- Phased national implementation rollout of 1.0 to staff, then to volunteers.
- In-Person training & support with all Foundation staff
- Regular monthly communication updates to all national leaders and staff.

When

- Project Kickoff August 15, 2019
- Global Product Demo 0.5 Version September-October 2019. Gather feedback for national functional requirements.
- Product development of version 1.0 September 2019-March 2020
- User Testing & Data Migration February-March 2020
- Global Rollout, Implementation, & Training Spring-Summer 2020

Now What

Leaders, Managers, and Employees

- Be on the lookout for more information
- Promote and build excitement around the project!
- Be prepared to be involved in the development of the product.

5

**Communication
planning**

Types of communication



General Communication

- Most frequently this is an overview of the change effort, or communication that applies to all stakeholder groups
- Timeline updates, changes in go-live dates, or additional options for training can all be communicated this way
- There is often a consistent cadence, such as a weekly update



Targeted Communication

- Focuses in on a specific stakeholder group and provides more detailed information specific to them























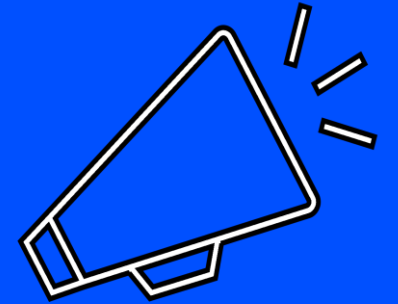
Bi-directional Communication

- This is the most effective, hands down. People can ask questions and discuss concerns with the change

Example: Communications Rhythm of Business

 Meeting |  email

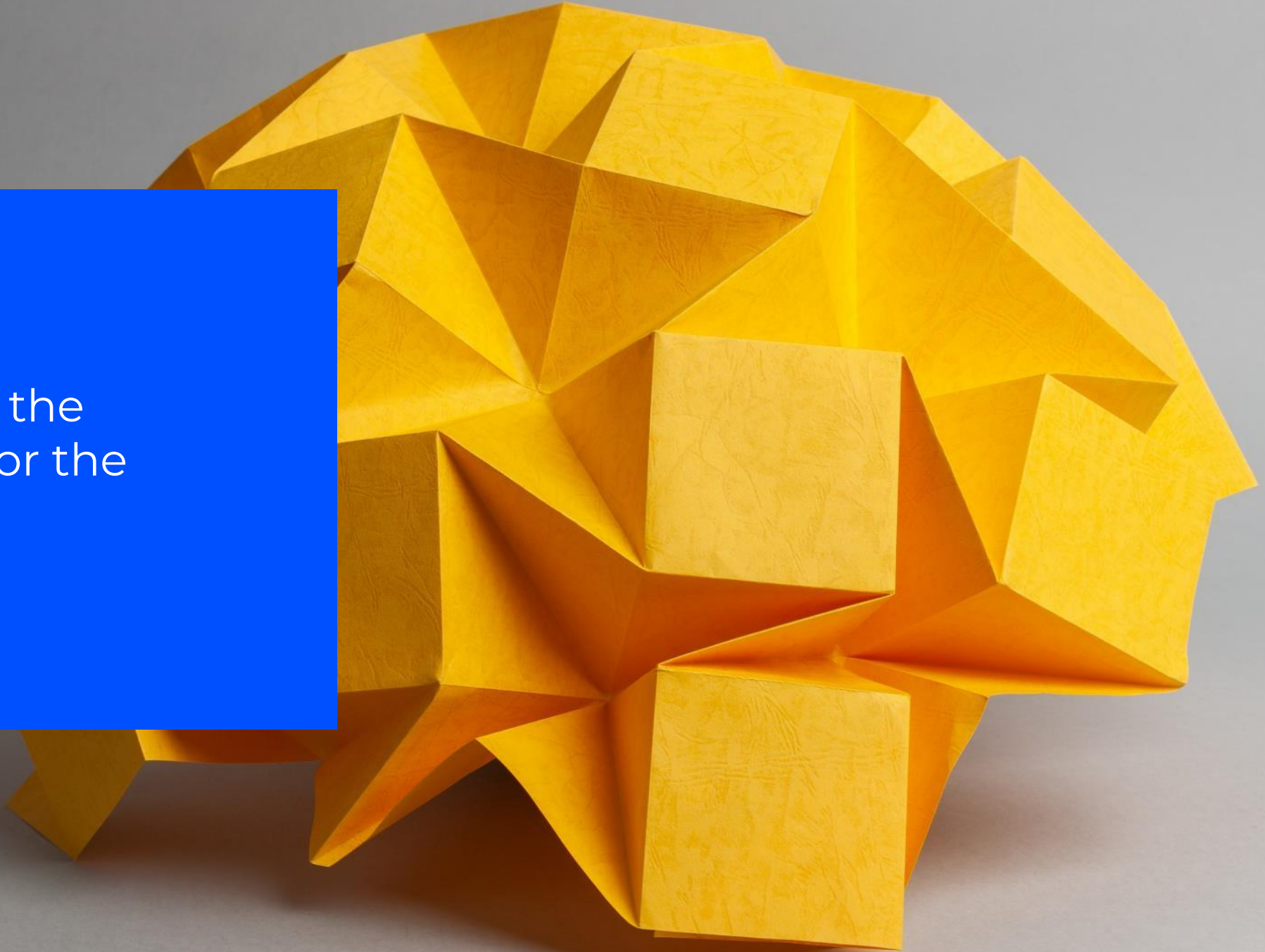
WORKSTREAMS	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Executive Pipeline  Monthly Update	 Jessica + Liya (weekly)	 Jodie + Liya (bi-weekly)	 EPD Agenda	 Jessica + Liya (weekly)	 EPD Sync (bi-weekly)  EPD Notes + Actions  Quarterly Acc Events Dashboard Readout
Stakeholder Readiness <ul style="list-style-type: none">• Finance• Operations• Human Resources (HR)• Leadership• Beneficiaries	 Finance (bi-weekly)  Operations (bi-weekly)	 Leadership (monthly)		 HR (bi-weekly)	 Change Update (weekly)
Community Management <ul style="list-style-type: none">• US• EMEA  WW Monthly Newsletter (delivered 1 st of each month)	 US Field Ambassadors  Change Update (monthly/quarterly)			 US Community Call (monthly)  EMEA Community Call (monthly)  Community Notes	
Change Team Management	 Change Team (weekly)		 Change Lead + LT (bi-weekly)		 Change Status & Action Items (weekly)



What form does change communication planning take in your organization?

What can you do differently – what will you add to your communication strategy?

Designing the
message for the
'head'



Vision: What will the new reality look like?

Begin with the end in mind.

- Describe the desired future, what will reality look like when we come through this change
- We will be able to:
 - Do this
 - Avoid that
 - Include these folks
- This is where we can start to discuss benefits and tell a story



WWIFM: Why is it critical for your audience to act now?

“What’s in it for me?”, also known as WWIFM.

- Revisit the **why** in your Change Story
- Describe the **benefits** of the change to your audience and reinforce the **WWIFM**
- **Provide transparency** and provide visibility of upcoming deadlines and milestones on the timeline
- Encourage **active participation** and **engagement** to ensure a smooth change and transition



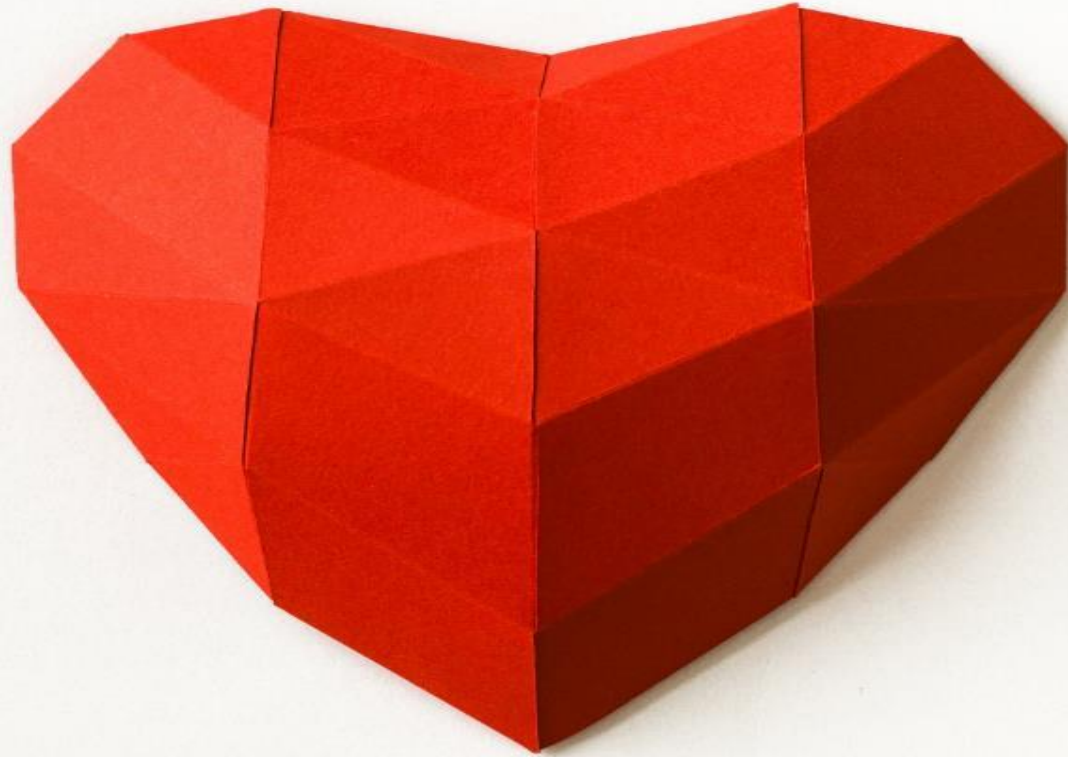
Next steps and call to action

Conclude your message with a call to action.

- Be succinct
- This call to action can be based on:
 - Specific timelines
 - Need for help
 - Testing
 - UI Evaluation
 - Input on process
 - Concerns
- Cover who will be leading a particular next step, if possible
- Include a deadline, if possible



Designing the
message for
the 'heart'



Thinking of the change beyond the logical components

- Appealing to our **motivations** and **desire** to be of use
- By providing facts as well as an **appeal to the heart** we engage stakeholders on multiple levels of decision-making
- Some people are more **subjective** in their decision-making, others more **objective**



Can you address the emotional component

- Discuss the **benefits** in terms of removing pain points or inconvenience
- **Client satisfaction** and **happiness** with a service or product can also be an emotional tie
- The emotional aspect of a change often includes **fear** and **uncertainty**, so plan to address it



How do you show empathy

- **Listen** more than you speak
- Ask clarifying questions that also **show understanding** and **interest** of the person's perspective
- **Express gratitude** for their feedback
- **Be supportive** and **encouraging** whenever possible



Know yourself: Are the hesitations on your end?

- Understand your own concerns around the initiative and be ready to answer those questions from others
- Be genuine, but also supportive of the project
 - People can often sense your objections or misgivings
 - If asked a direct question, be as honest as possible
- Be prepared to answer the question “Why do you support this initiative?”
 - This answer may change and evolve as the initiative continues



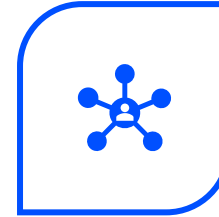
7 principles of effective change management communication



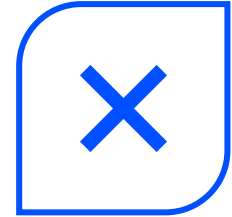
**COMMUNICATE
REGULARLY AND
FREQUENTLY**



**DON'T OVER-RELY
ON EMAIL**



**USE A VARIETY OF
COMMUNICATION
MEANS**



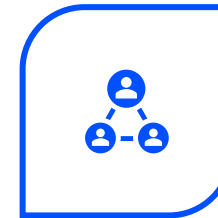
**DON'T USE A TOP-
DOWN, ONE SIZE FITS
ALL APPROACH**



**USE PREFERRED
SENDERS**



**PREPARE
COMMUNICATORS**



**CREATE
OPPORTUNITIES FOR
TWO-WAY DIALOGUE**

**Learn more about your
strengths and how you handle
change through a
complimentary Predictive
Index Assessment**

Break
15
Minutes





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