what is
CHANGE MANAGEMENT?

Change Management is the discipline that guides how we prepare, equip and support individuals to successfully adopt change in order to drive organizational success and outcomes.

HOW TO USE
THIS GUIDE

A well defined strategy is integral to driving adoption and user engagement.

This workbook will help you define a change management strategy for an initiative, and then build a plan to effectively deploy the strategy.

We believe that there are several key steps when designing an effective Change Management Strategy. In this interactive guide, we'll walk you through each step, providing some question to help inspire your ideas. Then, you'll answer the questions for yourself to reflect your own organization's business processes and strategies.

When you're all done, you'll have a downloadable/printable form to help you institute change within your organization.

designing your
CHANGE MANAGEMENT STRATEGY & PLAN

There are KEY STEPS to designing and effective Change Management Strategy

1 **DEFINE THE VISION**
Why are we doing this? What is the purpose of the initiative?

2 **DETERMINE THE KEY PLAYERS**
Who is the impacted audience?

3 **DESIGN THE MESSAGE**
What should we say to everyone?

4/5 **DEVELOP & DEPLOY THE PLAN**
How are we going to communicate and train?

6 **DIAGNOSE THE RESULTS**
How are we going to measure impact?

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1 DEFINE THE VISION

Why are we doing this? What
is the purpose of the initiative?

Before you design the change management plan, make sure you connect the initiative to your organization's greater mission. As you develop your message, incorporate these answers into the overall communication plan.

CLICK ON EACH QUESTION **Q** TO SEE A SAMPLE ANSWER

How will we know this initiative has been successful?

How will we measure and report on our success?

What have we deployed in the past that has been successful? What made it successful?   Are there elements from that strategy we should replicate?

When people talk about this initiative, what do we want them to say?

How do we want this initiative to be portrayed to the organization?

What are we going to name this project?

1 DEFINE THE VISION
Why are we doing this? What is the purpose of the initiative?

Now it's time to answer these questions for yourself and develop your vision for your organization. Click in the empty box to enter your answers

Q How will we know this initiative has been successful?

Q How will we measure and report on our success?

Q What have we deployed in the past that has been successful?
What made it successful?
Are there elements from that strategy we should replicate?

Q When people talk about this initiative, what do we want them to say?

Q How do we want this initiative to be portrayed to the organization?

Q What are we going to name this project?

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2 DETERMINE KEY PLAYERS
Who is the impacted audience?

Define all the segments of your audience who will be impacted by the initiative. Identify your change group and change agents. Outline how they will be impacted. Each group may need a customized communication/engagement strategy to ensure adoption. Always step into your audience segments' shoes when planning communciations, events, outcomes.

AUDIENCE	ROLES/LOCATIONS	CONSIDERATIONS
C-Level	Executive Team CEO, COO, CFO, CTO, CHRO	√ Make sure this team gets access to the success and impact metrics
Project Steering Committee	VP Talent VP Learning and Development VP Sales Operations VP Manufacturing Operations VP Technical Operations	√ Have each stakeholder identify the change agents within their team across different org levels
Project Team	Corporate HRIS Team, HR Business Partners	
Sales & Marketing	Regional Directors Area Managers Sales Executives Sales Support Directors/Managers Marketing Directors/Managers	√ Cannot be rolled out at quarter end. √ See if we can get on the agenda for this year's Sales √ Kickoff meeting. √ Get buy in on Phase 1 dashboard reports, set expectations for multi-phases
Services	Client Relations-all locations Technical Support -all locations Training-all locations	√ Rollout before Q4 -crunch time for services √ Ensure we can do all translations (in house and outsourced) by go live. √ Get buy in on Phase 1 dashboard reports, set expectations for multi-phases
Manufacturing	U.S. Plants by Region EMEA Plants by Country APAC Plants by Country by Region	√ Rollout before end of quarter, end of month. √ Need to reach 3rd shift teams face to face. √ Mobile is not in Phase 1, set up kiosks for manager access mfg.floor √ Get buy in on Phase 1 dashboard reports, set expectations for multi-phases
Engineering	Product Groups-all locations Research & Design-all locations	√ Avoid end of month, end of quarter roll out √ Get buy in on Phase 1 dashboard reports, set expectations for multi-phases

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AUDIENCE	ROLES/LOCATIONS	CONSIDERATIONS

3 DESIGN THE MESSAGE
What should we say to everyone?

Think through all communication components for each audience segment.
Each one may need a customized approach in how you communicate to them and what you communicate to them.

AUDIENCE	Why is there DISSATISFACTION with the current state?	What is the VALUE of the future state?	What are the FIRST STEPS that will be taken to get there?	What may cause RESISTANCE to change?
Executive Team	Cannot easily access data Data is at least a week old when reported Spreadsheets too cumbersome Need graphical display	√ Visual representation delivers information instead of data • easy access to graphical reports • data is updated within 15 minutes of report being run • drill down capability √ Executive Admins have access to provide detail as needed	1. Demo Dashboard to key audiences to gain feedback and buy-in before moving to production 2. Manage expectations and create anticipation 3. Job aids and training provided for Executive Admins	√ Execs may not like having to log into the portal to access √ Possible disagreement among geographies on dashboard content √ Mobile access not available for Phase 1, more of an impact on Sales
Managers Supervisors (all businesses)	Reports not timely, reminders can be out of date, irritates those who have completed on time, demotivates. Too much emphasis on "data", cumbersome to analyze Manufacturing sites: limited access to reports due to working on the floor	√ Allows managers to give positive reinforcement to those who complete on time √ Visual representation effective during staff meetings √ Phase 2-Mobile √ Kiosks for Manufacturing sites	1. CEO Kick off, review role of steering committee so they can see their business is represented, project plan review (high level)	√ Have to time the roll out carefully, not end of month or quarter
Sales	No mobile access, reports do not meet their needs	√ Phase 2 Mobile access √ Discovery completed on types of reports needed, will have two ready for Phase 1	1. Communicate plan to enable mobile for Phase 2, and additional reports	√ Cannot roll out at end of quarter, end of year.

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4/5 DEVELOP & DEPLOY THE PLAN

How are we going to communicate and train? Develop & Deploy the plan, brainstorm effective tools, methods.

Effective change includes both communication and training. Use the change network you developed to help communicate the change. Consider creating a theme and using special events to promote the change.

Phase	Message/Topic (What)	Delivery Method (How)	Audience Segments (Who)					Schedule/Frequency (When/How Often)	Communicator (Owner)	Status/Comments
			Exec	Dir	Cng Mgmt	Mid Mgr	Proj Team			
Pre-Launch	Executive Overview with Q&A session - High Level	Presentation @ Monthly Exec Mtg	X					1/22/2016	Project Sponsor, Project Mgr., Change Mgt. Lead	Meeting Confirmed Presentation in Final Draft in Review
	Executive Overview Deck - Follow-up from Q&A session	PowerPoint via Email	X					1/25/2016	Project Manager	Not Started
	Executive talk-track (use with Directors, Mid-Managers	PowerPoint via Email		X		X		1/22/2016		Final Draft in Review
	Manager training via change mgt. team by Business Unit	Instructor Led Training		X		X		1/27/2016		Dry Run Complete, Editing Materials
	Job Aid-explanation of reports, delegation rules	PDF via Email	X	X		X		1/27/2016	Project Manager	Final Draft in review with project team
	Prep IT Help Desk on launch details, provide code to track related tickets	WebEx meeting					X	2/1/2016	Project Manager	Call confirmed
	Define measurement strategy	Validate with stakeholders					X	2/11/2016	Project Manager	Working draft
	Go/No Go Decision	Stand up project team meeting					X	2/11/2016	Project Manager	TBD
Launch	Final Check	Stand up project team meeting		x	x			2/12/2016	Project Manager	TBD
	"We're Live!" Announcement	Email, Pop-Up at Login	x	x	x	x	x	2/15/2016	Change Mgt. Lead	Final Draft in Review
	Check-ins with select Executives, Directors, Mid-Managers	Walk-bys, IM, email	x	x		x		2/16/2016	Change Mgt. Business Unit Leads	TBD
	Check-in with IT Help Desk tickets submitted	Call to IT Help Desk Supervisor			x			2/17/2016	Project Manager	TBD
	System Demonstration training sessions	WebEx meeting and in person								
Post-Launch/ Ongoing	Post Launch Survey-first impressions, what worked, what didn't	Survey Monkey						4/8/2016	Project Manager	TBD
	Focus Groups by Business Unit	Instructor Led Training	x	x		x		Week of 4/18/2016	Change Mgt. Business Unit Leads	TBD
	Survey, Focus Groups Feedback Follow-up with Executive Team	Topic on March Agenda	x					3/28/2016	Project Sponsor, Project Mgr., Change Mgt. Lead	30 minute slot confirmed on agenda
	Ongoing Survey by Business Unit	Survey Monkey	x	x		x		Quarterly	Project Manager	TBD
	Ongoing Focus Group by Location	Brown Bag Lunches with WebEx for Remote Attendees	x	x		x		Quarterly	Change Mgt. Business Unit Leads	TBD
	Communicate measurement results	Presentation @ Monthly Exec Mtg	x	x		x	x	5/27/2016	Project Manager	TBD

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Pre-Launch										
Launch										
Post-Launch/ Ongoing										

6 DIAGNOSE THE RESULTS
How are we going to measure impact?

Determine internal/external tools needed to measure success
Identify the measures that will allow you to see whether you are on the right track - what expectations does the organization have for the project?

OBJECTIVE	MEASUREMENT APPROACH	CONSIDERATIONS		30 DAYS	60 DAYS	90+ DAYS
External-Create 3 post-launch surveys: Executive, Director, Manager Will also need on-going surveys	Survey Monkey	√	Check with Change Mgt. Director on license restrictions, possibility of adding advanced tool package (PMO has budget for this)	X	X	X
Internal-schedule conference room with WebEx capabilities for post-launch and ongoing	Focus Groups	√	Check if PMO can handle budget for refreshments and/or lunch	X	X	X
Compliance Curricula	LMS Portal Utilization Reports				Completion rate goes from 89% to 99% (allowing for employees on LOA)	
Annual Performance Review	EPM Portal Utilization Reports					Completion rate goes from 76% to 99% (allowing for employees on LOA)

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