LEARNING FROM CHANGE
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PRESENTED BY:
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Objectives for Today

✓ Examine key drivers & enablers of change

✓ Explore the role talent development and learning leaders have in building learning agility and change management

✓ Learn how to capture lessons learned about building organizational change expertise

Talent & Learning: Role in Change

- Enterprise perspective

- Experts in behavior change and employee motivation

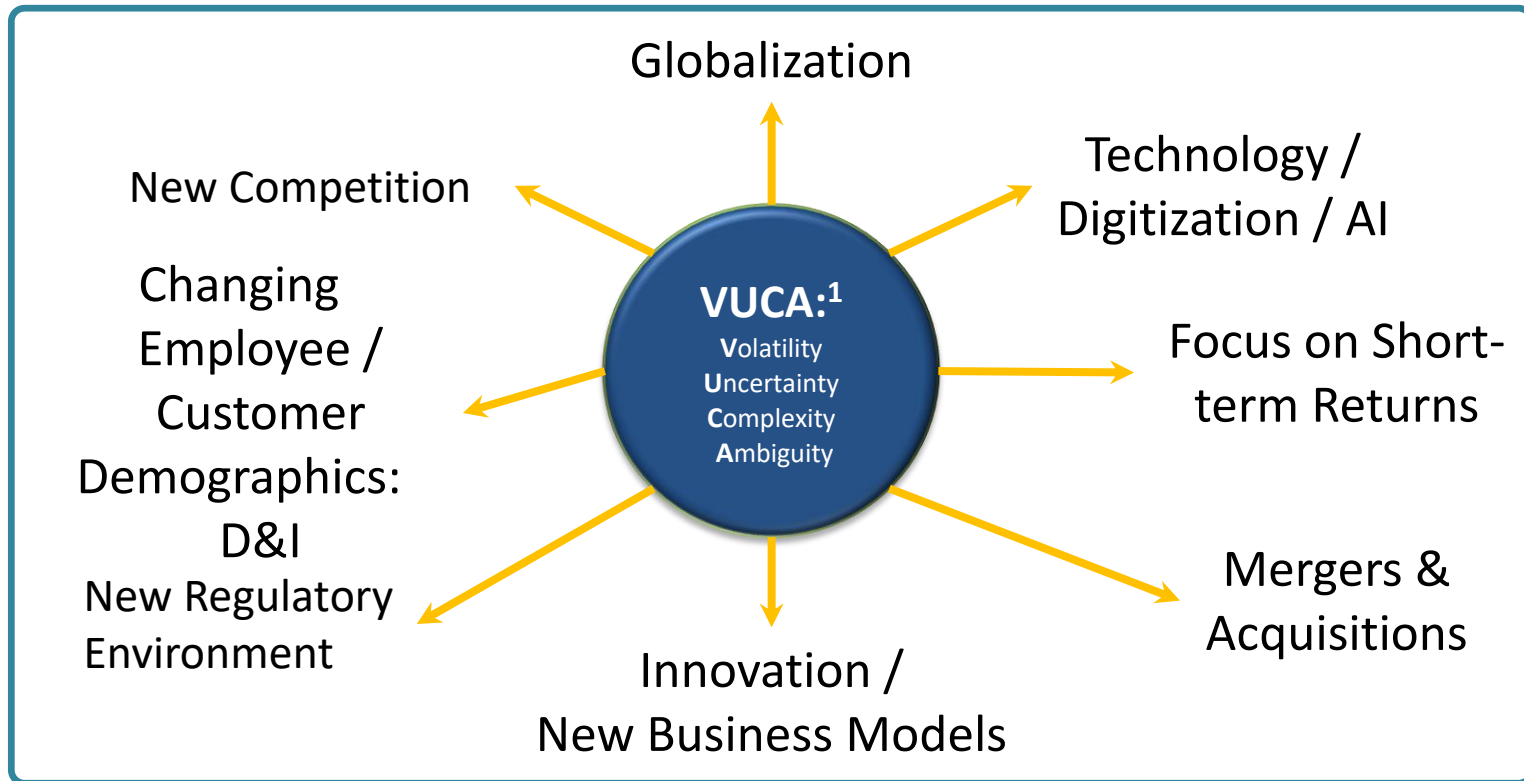- Focus on improving organizational and individual performance

POLL

What best describes your current role?

☐ Talent Development

☐ Training / Learning that incorporates other functions (i.e., Diversity & Inclusion, Talent Management, Change Management Organizational Effectiveness)

☐ Change Management

☐ Other (please write in Chat Box)

Change is Accelerating

CHAT BOX: What change is having the MOST impact in your organization today?

Globalization

New Competition

Changing Employee / Customer Demographics: D&I
New Regulatory Environment

VUCA:[1]
Volatility
Uncertainty
Complexity
Ambiguity

Technology / Digitization / AI

Focus on Short-term Returns

Mergers & Acquisitions

Innovation / New Business Models

_____

[1] Army War College terminology

Globalization + Workplace Change

Higher Productivity Demands / Workplace Stress and Change

- **24/7 operations**
- **Leverage resources**

Diversity & Inclusion

- **Adapt to diverse workforce**
- **Enhance innovation**

Scarcity of Talent

- **Global pool**
- **Address "War for Talent" / Do more with less**

Local / Global Growth

- **Adapt to local customs**
- **Be culturally competent**

Valeocon Organizational Model

Deploy a holistic perspective to **co-discover, co-design** & **co-deliver** fit-for-purpose change management solutions that accelerate adoption and address complex business challenges.
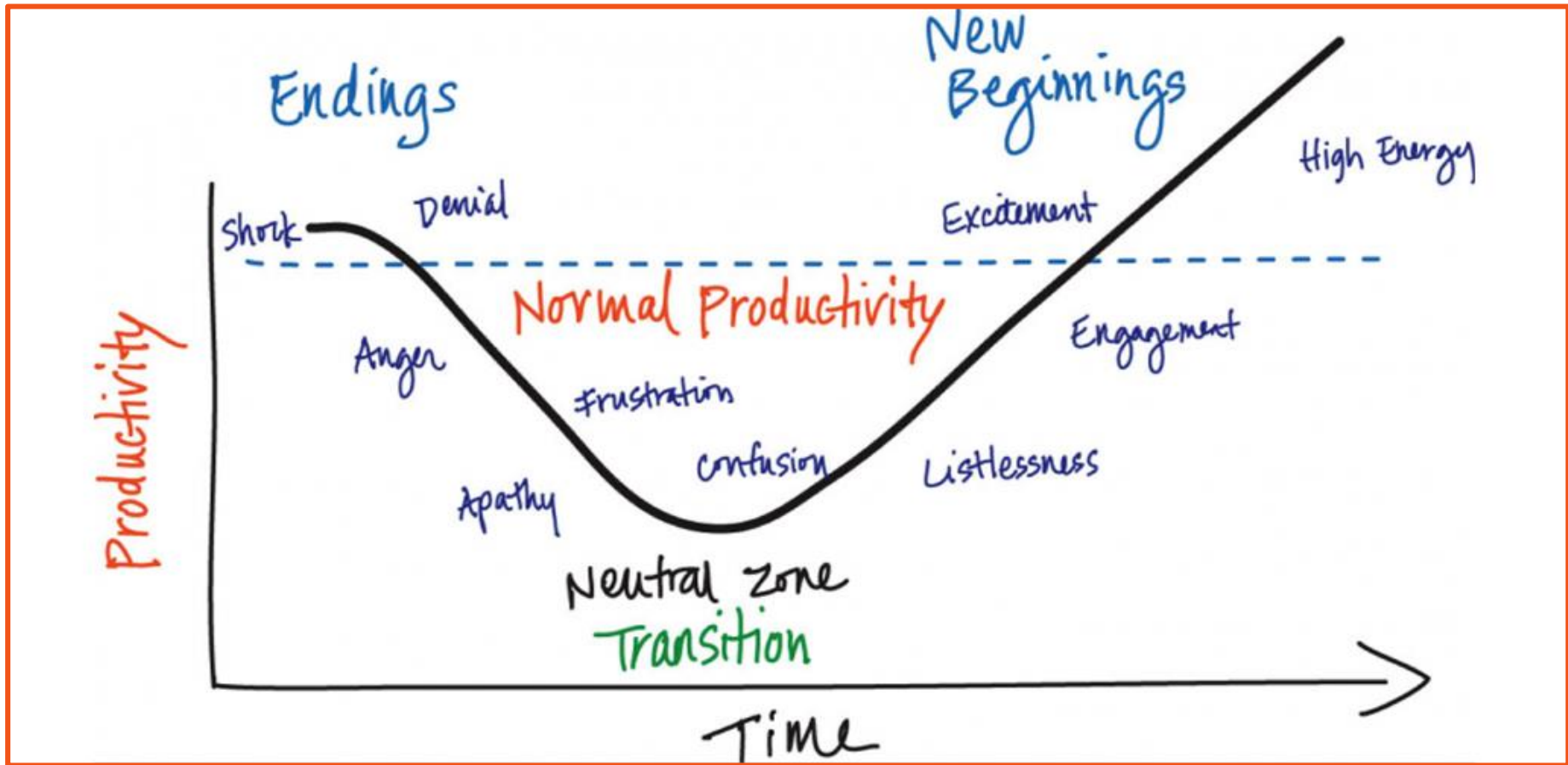
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POLL

What best describes your current role in change management?

☐ Key focus / lead change

☐ Often part of Transformation Team initiatives

☐ Sometimes involved in change efforts

☐ Not at all involved in change efforts but want to be
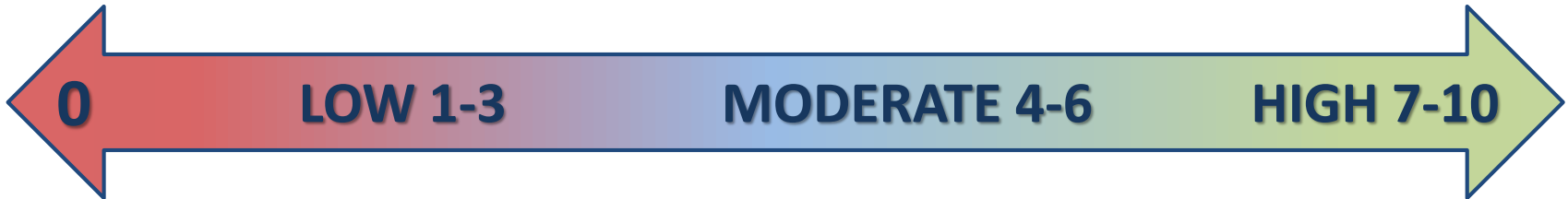
☐ Other / write in Chat Box

Change & Productivity

Source: William Bridges

POLL

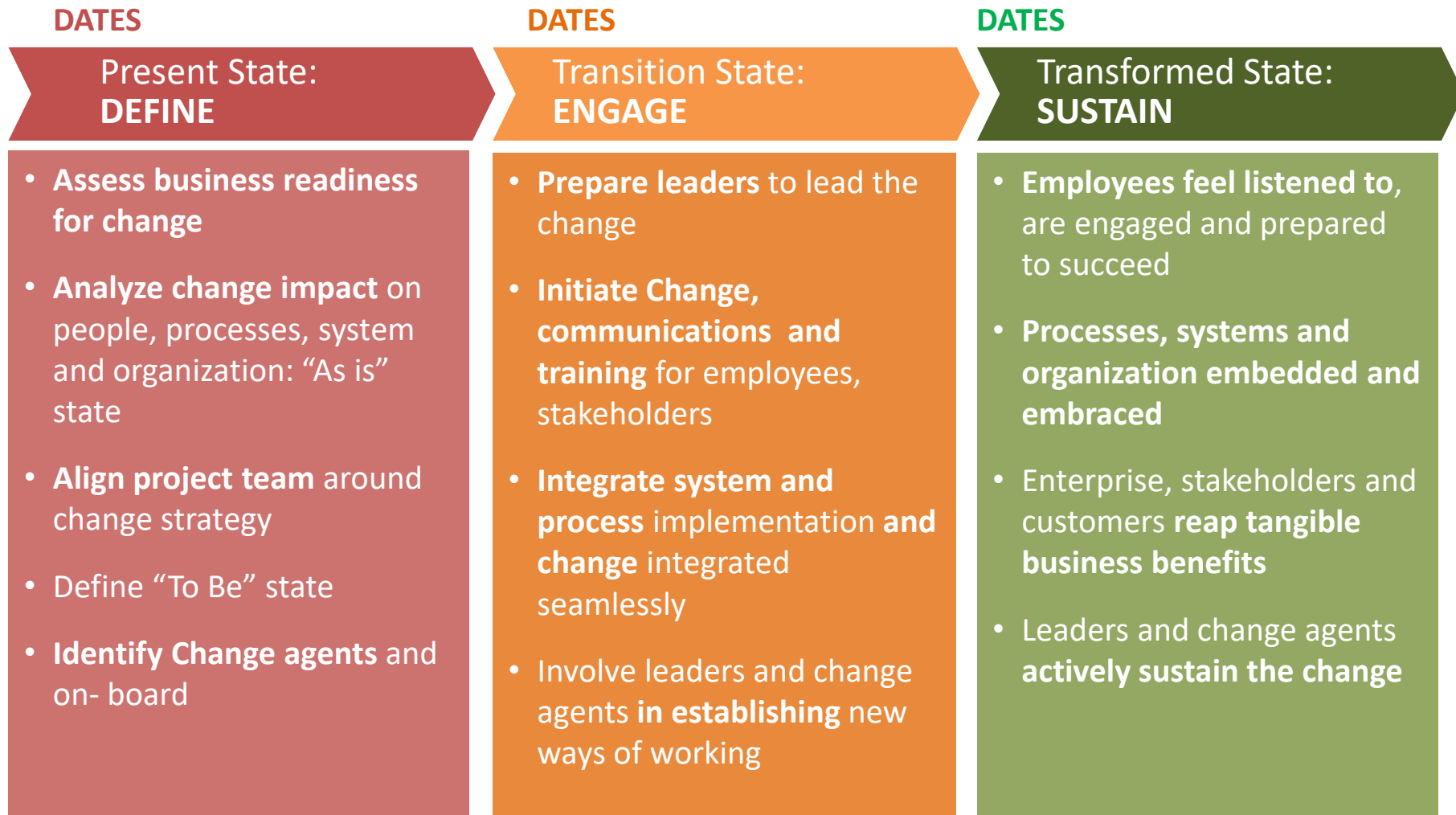Rate Your Company's Change Effectiveness

0 ← LOW 1-3   MODERATE 4-6   HIGH 7-10 →

☐ **0:** NON-EXISTENT

☐ **1-3:** MODERATELY EFFECTIVE

☐ **4-6:** EFFECTIVE

70% of change efforts fail.

-McKinsey & Co.

☐ **7-10:** HIGHLY EFFECTIVE

3-Phased Approach: Change Plan

Present State: DEFINE

- **Assess business readiness for change**

- **Analyze change impact** on people, processes, system and organization: "As is" state

- **Align project team** around change strategy

- Define "To Be" state

- **Identify Change agents** and on- board

Transition State: ENGAGE

- **Prepare leaders** to lead the change

- **Initiate Change, communications and training** for employees, stakeholders

- **Integrate system and process** implementation **and change** integrated seamlessly

- Involve leaders and change agents **in establishing** new ways of working

Transformed State: SUSTAIN

- **Employees feel listened to**, are engaged and prepared to succeed

- **Processes, systems and organization embedded and embraced**

- Enterprise, stakeholders and customers **reap tangible business benefits**

- Leaders and change agents **actively sustain the change**

11

Learning & Talent Role in Change Plan

Present State: DEFINE	Transition State: ENGAGE	Transformed State: SUSTAIN
• Conduct **organizational change diagnostics** • **Integrate** with Transformation Team from a talent perspective • **Assess** current and needed skills and gaps /create **plan to close**	• **Leadership development** to lead the change • **Provide training** around new ways of working • Help individuals and teams build **resiliency capability** • Track **metrics** and **recommend actions**	• Compare **pre-and post-organizational change diagnostics** / recommend **needed action** / Assess employee engagement levels and create action plan • **Update EVP** as needed • **Capture lessons learned** for future change initiatives

Governance / Structure for Change

Essentials to Obtain Traction

Sponsorship / Funding

CM Plan/ Stakeholder Analysis

Transformation Team Charter
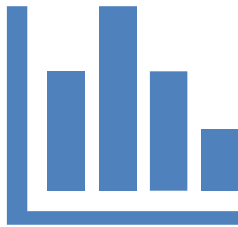
Metrics

Buy-in
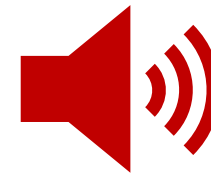
Communications / Cadence

Learn as you go &
calibrate / build organizational capability

WATCH&
LEARN
webcasts

atd

Talent / Learning & Key Change Management Enablers

	Stand up Organization Structure
	Clarify Roles & Responsibilities*
	Streamline Governance / Decision making*
	Provide Resources as needed
	Provide Training for New Roles*
	Address Employer Value Proposition: Attract / Retain*
	Collaboration Mechanisms
	Periodic Diagnostics & Calibration*
	Make Progress and Success Visible / Celebrate!*
	Build Personal Resiliency / Emotional Intelligence*

CHANGE = LEARNING / LEARNING = CHANGE

* Enablers where Talent / Learning can play a starring role

Clarify the Business Case

- We need to be competitive

- We need to grow (through innovation or Mergers & Acquisition)

- We have to adapt to new technologies / digitization

- Our customers are demanding more

- We want better business results

- Other?

Learning from Change:
Driving & Restraining Forces

LACK OF GOVERNANCE

ACCOUNTABILITY

COMPETITION FOR RESOURCES

CHANGE FATIGUE

CEO / LEADER SPONSORSHIP

PLAN & METRICS

ENGAGE WITH STAKEHOLDERS

DEMONSTRATE / CELEBRATE SUCCESSES
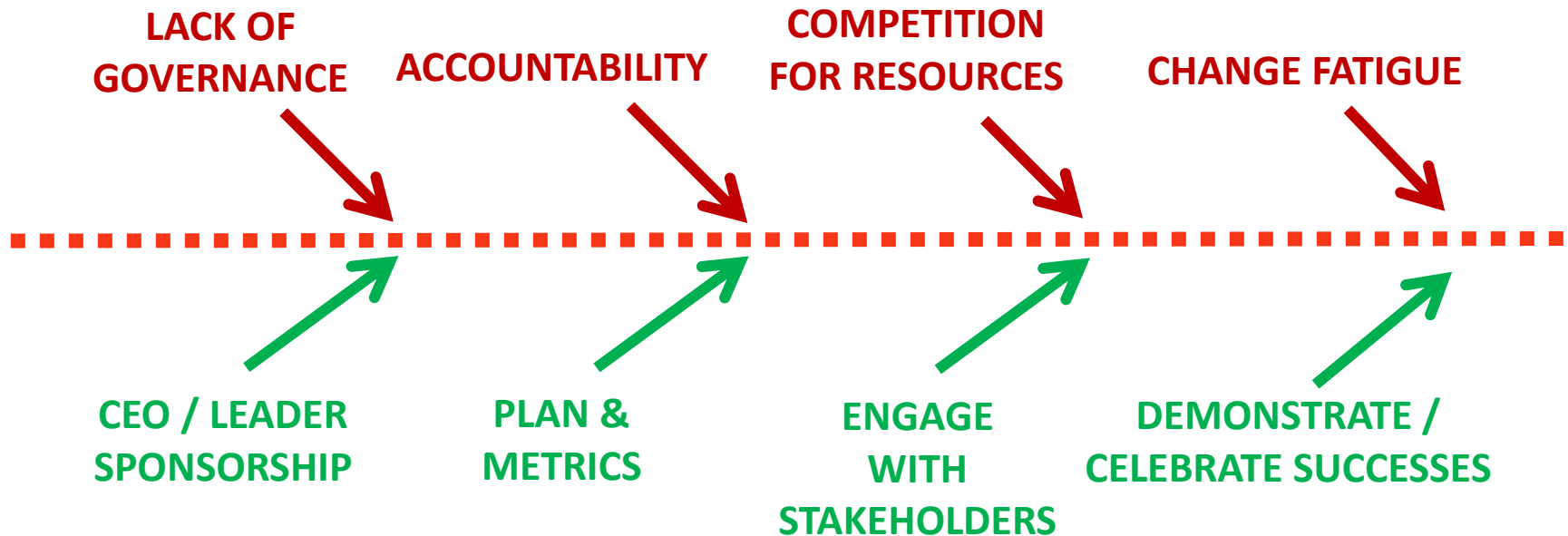
POLL

What is the greatest barrier to effective change management in your organization?

☐ Lack of Governance

☐ Accountability

☐ Competition for Resources

☐ Change Fatigue

☐ Other (Write in Chat Box)

Five Change Management Questions

1 What is the **change about** and how is it different from today?

2 What will the **future state** look like?

3 How will the change **affect me**?

4 What will I **need to do differently** to be successful: how will I need to plan, interact and get results?

5 What **support** can I expect from my organization?

AUBO & Change Adoption

OWN
"I make it happen"

BUY-IN
"I live it"

UNDERSTAND
"I get it"

AWARE
"I have heard about it"
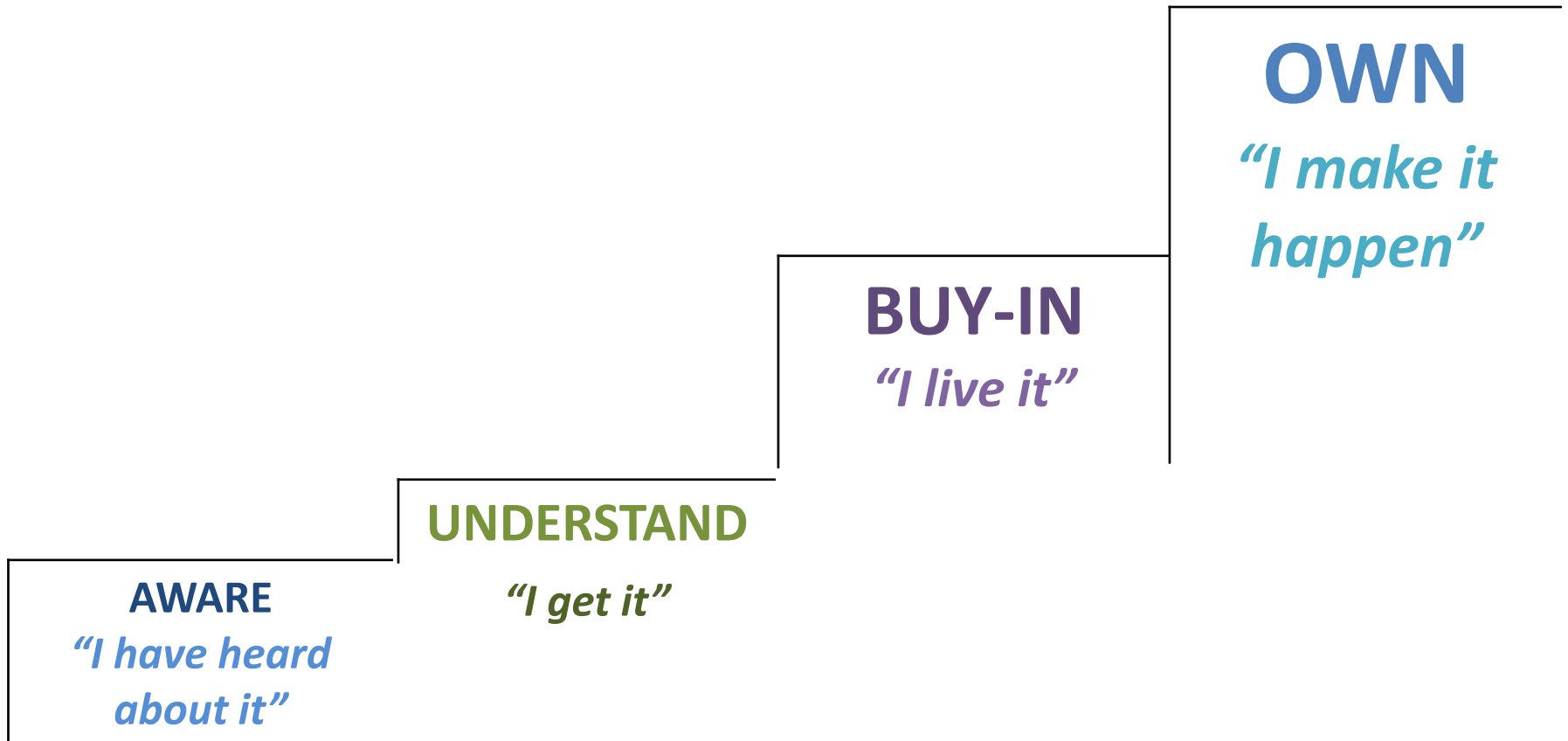
Identify where stakeholders need to be on the change steps.

Our Fitness-for-Change© Assessment

Select "Best Fit" Learning Approach

CHAT BOX

Your most successful change initiative

- What did you do as TM/ learning professionals do?

Communications Cascade

Town Halls, Interactive Meetings, 1:1 Conversations ➕ **CM Enablers: Learning, Resources, Reinforcement**

- Based on a cascading message process

- Interactive, promoting two-way communications

- Tailored to stakeholder

- Delivered via appropriate messenger: Involve direct managers often

- Timely, proactive and responsive

- Addresses the "What's in it for Me?"(WIIFM) at relevant audience level

Tailor Messaging by Stakeholder

Returns, profitability, & brand

Interesting work, Opportunities to contribute

Great returns, value & confidence, Growth company

Involved in the change Purpose-driven, Act as conduits to reinforce Opportunity to grow

Value: Growth, Product / Service / Cost

Board of Directors

Employees

Investors

WIIFM

Managers

Clients / Consumers
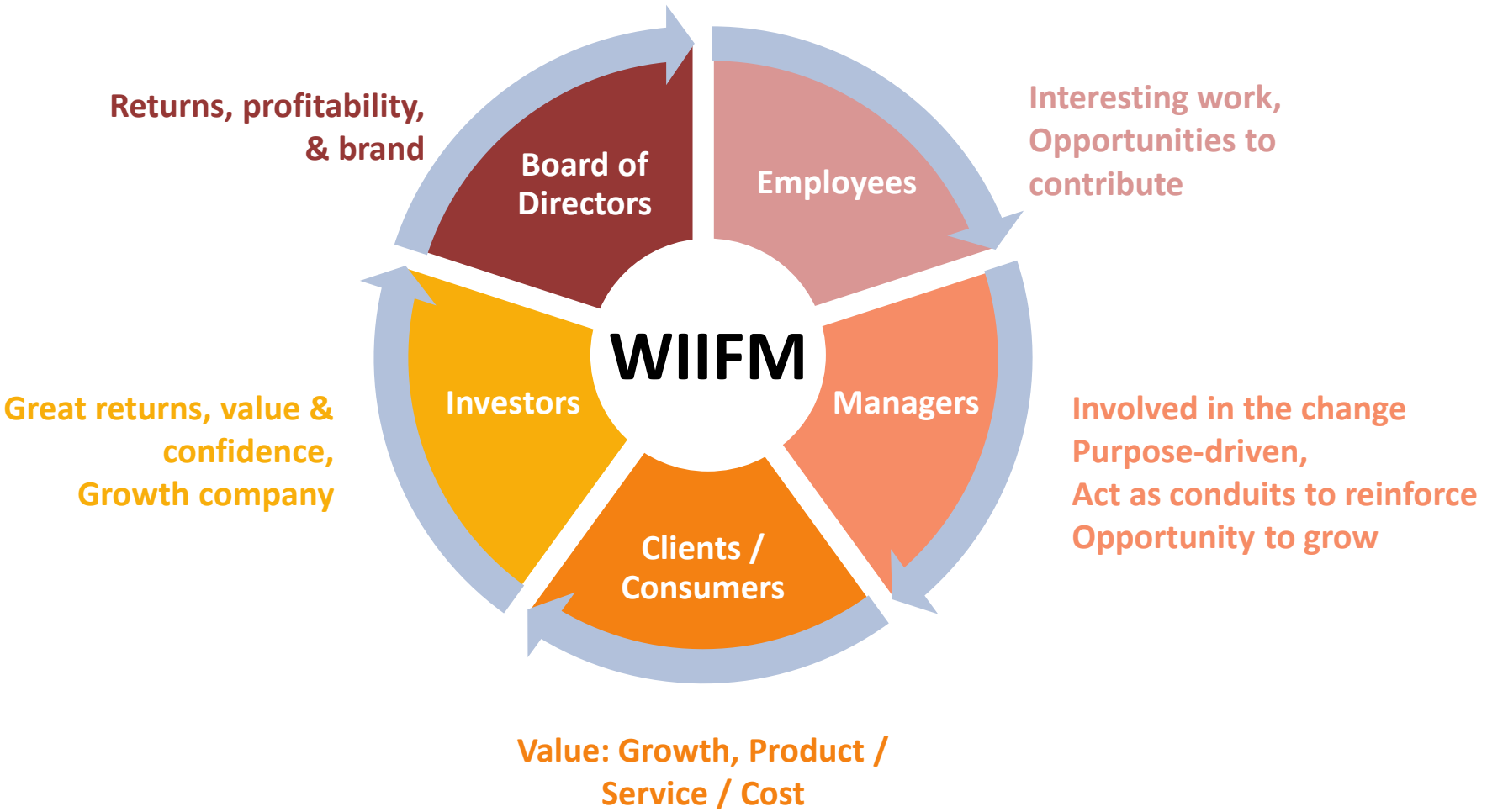
Address Employee Motivations

Why don't employees do what we want them to do?

(-) BARRIERS

Doesn't see a benefit

Doesn't have the skills or knowledge

Doesn't know about/understand the change

MOTIVATION

ABILITY

UNDERSTANDING

(+) SOLUTIONS

Reframe positive & negative incentives / consequences

Provide training, coaching and/or resources to employees with potential to perform

Provide information and communications
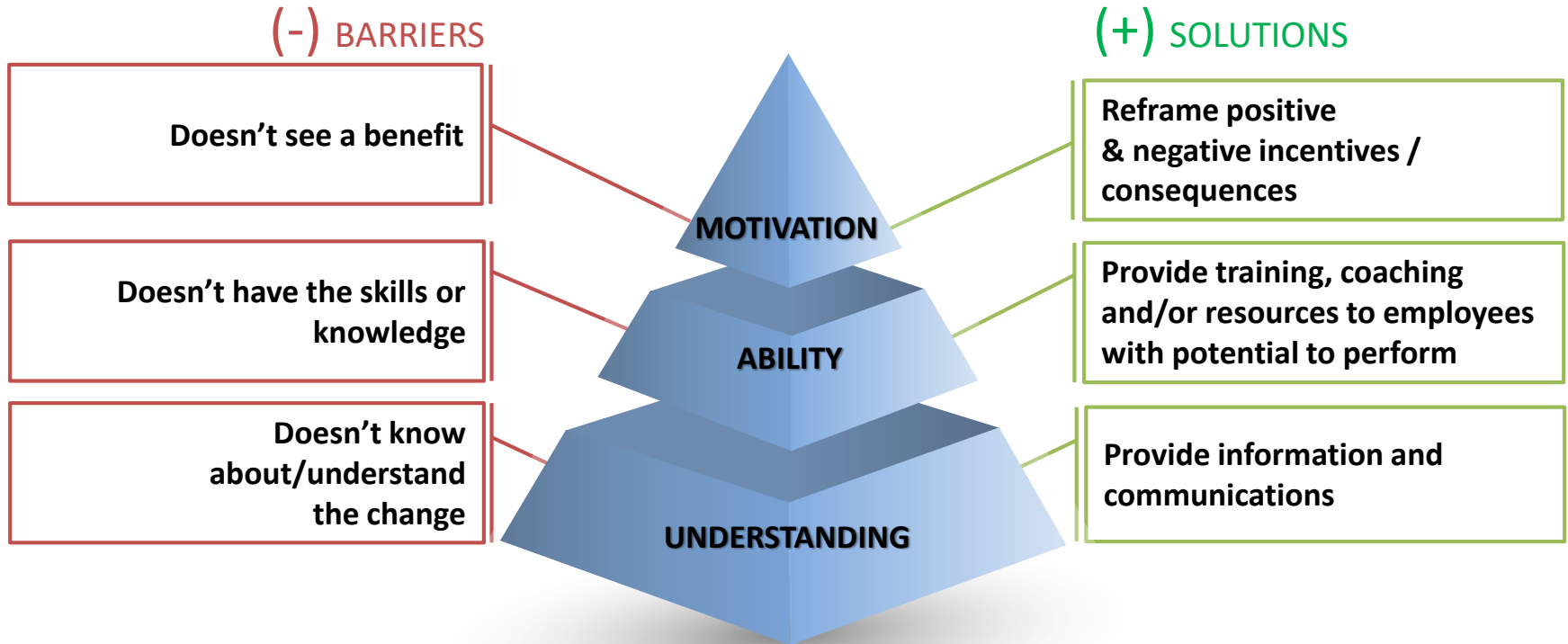
Define Change Journey Maps by Audience

NEEDS & EXPECTATIONS

Announcement
- Understand the change
- Information about what's to come

Engagement
- Leader engagement activities

1:1 discussions about role
- Follow-through on process that we committed to
- Start discussions on new structure and impact for the employee

Engagement
- Pulse check
- Revisit training, if uncertainties arise

Team breakfast with Audrey, organization announcement
Group event, more clarity new org

Lunch & Learn
Fun, information activity in groups

YER
Positive reaction

Team Day

Team Briefing
Personal interaction, more information

Invitation to YER or 1:1 with manager

Survey #1
Gather data on the team mood and surface concerns anonymously

Memo from Audrey

Uncertainties remain

YER
Neutral reaction

Initial concern

YER
Negative reaction

Address individual concerns in future 1:1 interactions (i.e. Jan. 1:1 meeting about role)

VOICE OF CUSTOMER

- *"I'm worried. Who is going to be my boss? Will I still have a job? What are all these teams doing?"*

- *"Doesn't sound so bad. Let's see if it really turns out that way."*

- *"What does this mean for me and my role?"*

- *"I'm starting to understand the change and the new model."*

- *The new model is complicated. I can't see how it will really work."*

Examples: Change Metrics

	Metric	Definition	Measured via
Change Management	Speed of adoption	How quickly are people adopting the change?	Usage / demonstration of skills/ new ways of working
	Utilization	How many people are applying the change in their daily work?	
	Proficiency	How well are people applying the change?	
Program Management	On-time	How timely are we delivering against agreed plan?	Deliverables actual vs. plan comparison
	In-quality	Are our deliverables accepted?	Approval of deliverables by Sponsor/Program Team/ Demonstrated improvement on key milestones
	In-budget	Do we stay within budget?	Progress against budget

Assess Change Insights

How will you collect this data? How will it be disseminated?

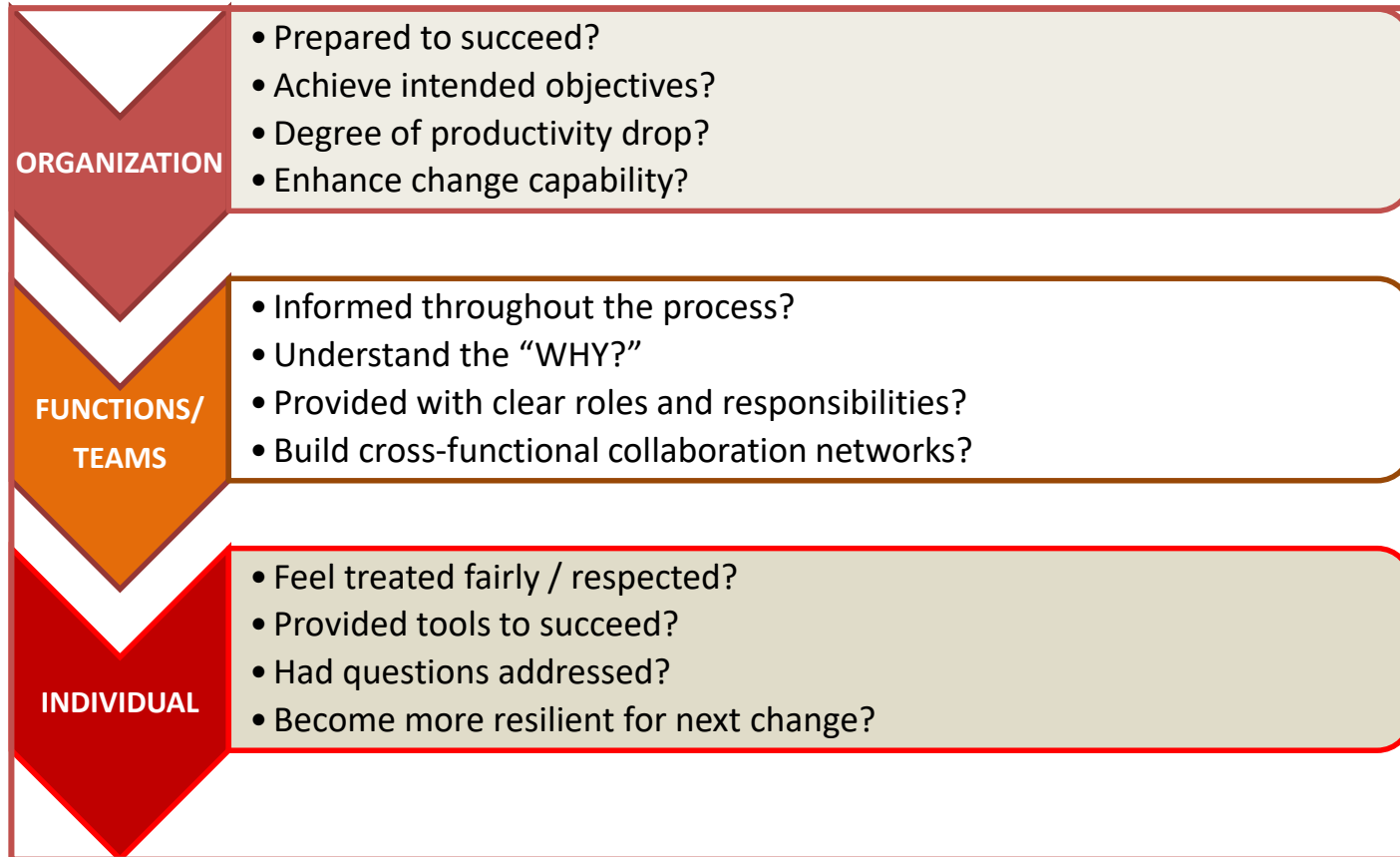| Present State: DEFINE	Transition State: ENGAGE	Transformed State: SUSTAIN
Which stakeholder groups were most effectively engaged? • **What will you do differently next time?** **Was the change management plan agreed to by sponsors and key stakeholders?** • **Were the necessary resources provided?** **Was a clear vision of the future provided?** • Did you obtain buy-in and commitment regarding the need for change?	**Did you prepare leaders** to lead the change ? • Did they receive advance notice of big changes? Were they equipped to address questions and resistance? **Were key change, communications and training provided as needed to** employees, stakeholders? • Were any groups left out? Were initiatives timed appropriately? **Were project and change plans** integrated? • What was on target? What missed the mark? Did **establish** new ways of working? • Were these supported with training and reinforcement?	Did the organization realize intended **benefits ?** • Where did we fall short and why? **Did employees feel listened to** and prepared to succeed? • What worked well? Where would we approach this differently next time? **Were necessary processes established?** • Were systems in place to support new ways of working? Did leaders and change agents **actively sustain the change?** • Did they understand their role and receive recognition?

# Insights / Change "Lessons Learned"

Collecting Data

- Get buy-in for need to capture lessons in advance
- Obtain feedback from multiple stakeholders:
  - Functions
  - Levels
  - Champions and Detractors
- Use multiple methodologies: survey, focus groups, interviews
- Keep it simple
- Build in Action Planning as part of the process
- Tailor "key takeaways" message by audience

Multiple Views: Lessons Learned

ORGANIZATION
- Prepared to succeed?
- Achieve intended objectives?
- Degree of productivity drop?
- Enhance change capability?

FUNCTIONS/ TEAMS
- Informed throughout the process?
- Understand the "WHY?"
- Provided with clear roles and responsibilities?
- Build cross-functional collaboration networks?

INDIVIDUAL
- Feel treated fairly / respected?
- Provided tools to succeed?
- Had questions addressed?
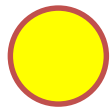- Become more resilient for next change?

Your Key Takeaway: Chat Box

Based on what you learned today, what is one thing you plan to do to enhance learning about change in your organization:
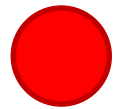
🔴 STOP

🟢 START

🟡 CONTINUE

Summary: Your Role in Change

COMMUNICATE

- Clearly
- Often

LEAD CHANGE

- Create a transformation team & charter
- Clarify priorities
- Identify / address challenges and obstacles

MANAGE CHANGE

- Build understanding to promote performance in new roles
- Develop new "Rules of the Road"

CAPTURE ORGANIZATIONAL LEARNING

- Build change management muscle

Additional CM Resources

ONLINE

- https://www.valeocon.com/right-sizing-change-management/
- https://www.valeocon.com/agile-approach-to-business-transformation/
- https://www.valeocon.com/tapping-the-reservoir-of-continuous-improvement-potential-your-employees/

OTHER

- Managing Transitions by William Bridges, *Da Capo Books*
- Change by Design by Tim Brown, Harper Business
- Change Initiatives Can Succeed, by Marjorie Derven, *CTDO Magazine*
- The Heart of Change Field Guide, by Dan S. Cohen*, Deloitte Development*
- Atomic Habits by James Clear, *Penguin Random House*
- Changing the Way We Change by Jeanenne La Marsh, *Addison-Wesley Publishing*

Final Q & A

For more information:

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Want to learn more?

Contact me to obtain a **Change Management Action Planner**.