

Digital Pioneers Programme

Learning Session 1 – Change Management Best Practice

Agenda

- What is Change Management
 - The Value of Change Management
 - Prosci Methodology
 - An approach to drive change
 - The convictions for success

Insight's Adoption & Change Management EMEA

- ✓ PROSCI Certified Change Management practitioners
- ✓ Microsoft Advanced Adoption Specialist Certified
- ✓ Microsoft P-CSU (Customer Success Unit)

EMEA : 20 consultants with 7 languages

US : 200 consultants

APAC : 5 consultants



What is Change Management?

A **change management practice** embedded within an organisation **supports** their business by **bridging the gap between people and the change (technology change)**, enabling the **desire**, gaining the **knowledge** and developing the **ability** to change. “

**Change is inevitable" – How people adapt to it is not. (*Benjamin Disraeli)*

A picture paints a thousand words





The Importance of Change Management

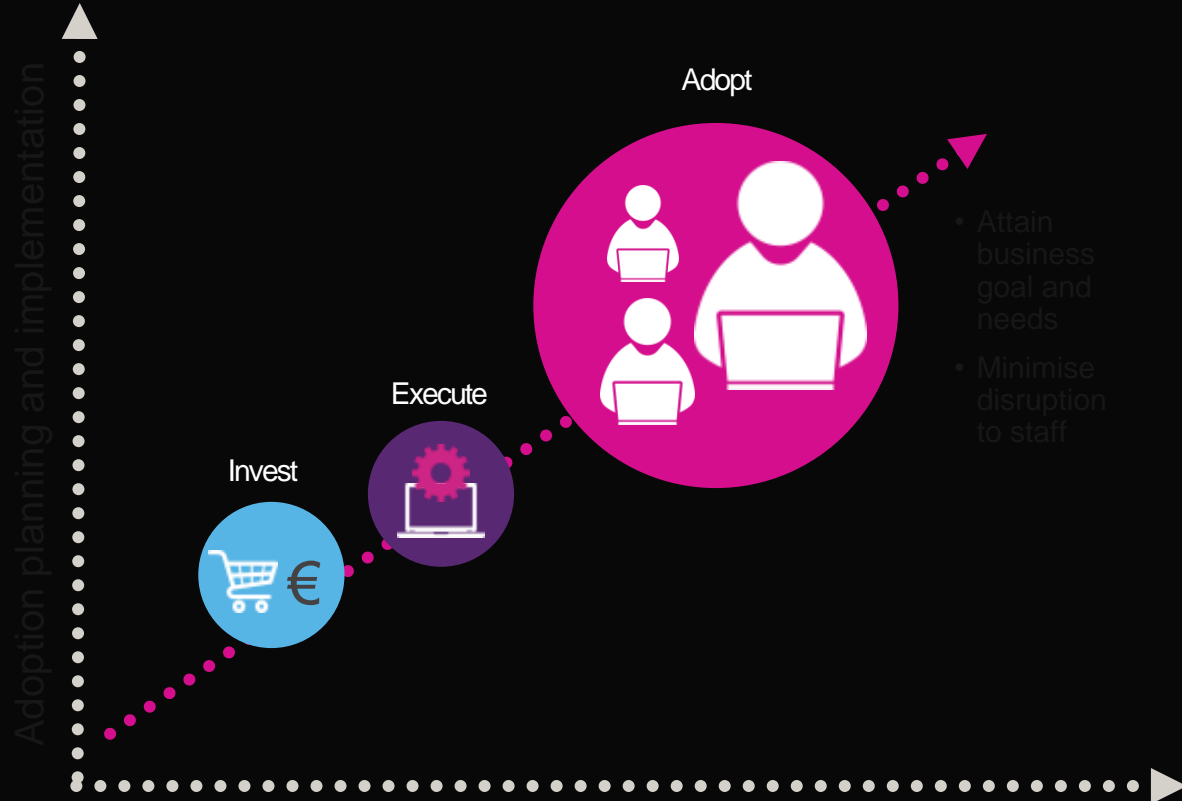
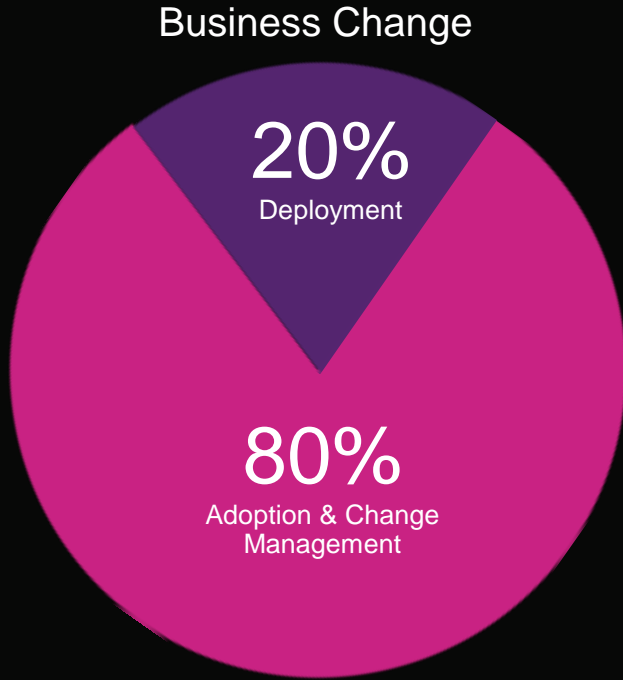
Successful adoption and change management is not just about technology, it is about process and people.



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Business Value of Adoption & Change Management



Why is Adoption & Change Management important?

70%

of the change programs fail to meet their project objectives because of the lack of Change Management¹

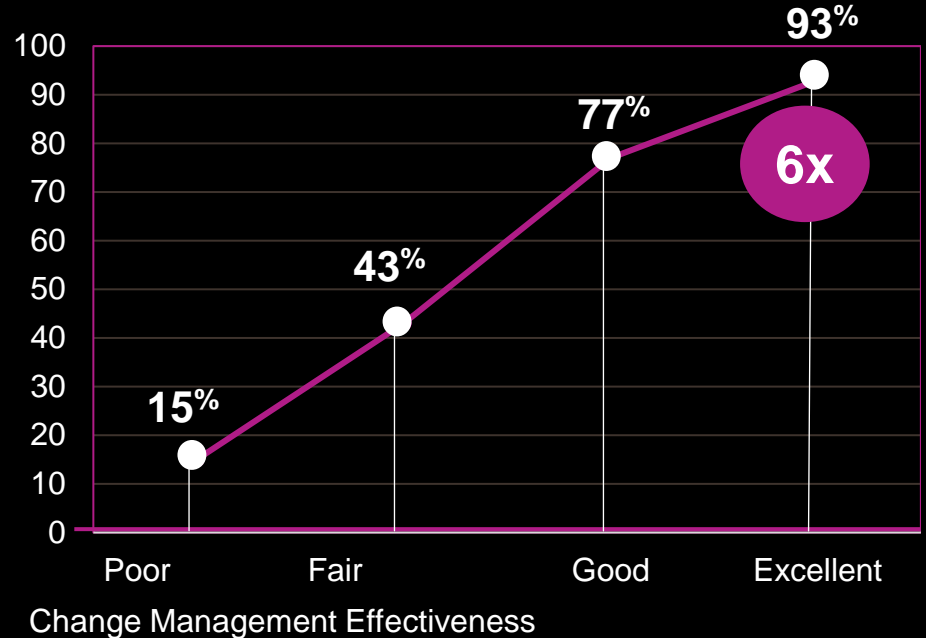
6X

more effective with excellent change management than projects with poor change management²

93%

of projects with excellent change management met their objectives

Percent of study participants who met or exceeded objectives (4,000 companies)



The key to successful digital transformation

The Human Factors that Determine the Financial Return or ROI

New technology solutions enable your employees and customers to achieve business outcomes – cost savings, time savings, simplifying and automating processes.

Speed of Adoption



How **quickly** are people **up and running** on new systems, processes and job roles?

Ultimate utilisation



How many employees (of the total population) are demonstrating “**buy-in**” and are **using** the new solution?

Proficiency



How well are individuals **performing** compared to the level expected in the design of the change?

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ADKAR 5 steps journey for change

Change management actions aim at supporting individual user & groups of users climbing those steps towards complete adoption.



Awareness

I understand why change is necessary.



Desire

I feel eager to change.
My will to change is stronger than my fears.



Knowledge

I have the theoretical background to succeed in changing and I know how to change.



Ability

I have acquired the main skills and behaviors, and I know how to operate after the change.



Reinforcement

I acknowledge the benefits of having changed.
I am encouraged to keep my new habits.

We believe there are 6 components of successful adoption and change underpinning communication and training.

Traditional approach to people change					
Know Your Customers	Engage your spheres of influence	Prepare your team	Communicate the right way	Provide relevant training assets	Monitor your KPIs
<p>The first concerned talk better about their experience, pains and needs.</p> <p>When building an offer based on your own assumptions, you might add your own biases and miss the user's real needs.</p>	<p>Without Rosa Parks and MLK, the Jim Crowe laws could have lasted much longer.</p> <p>Promoting successful early adopters while giving users the opportunity to relate to them, will help creating a viral effect.</p>	<p>Would you send any volunteer to a space mission?</p> <p>Skills, diversity and motivation within the project team will help you maximise the understanding of your users and the impact of your actions.</p>	<p>For most users, change is not good news.</p> <p>Better think twice (or more!) about how to formulate your message, which channel to choose and which timing to avoid!</p>	<p>Why am I participating in that training?</p> <p>Probably a common feeling during standard mandatory trainings...</p> <p>Avoid negative feelings and adapt format and content to your users!</p>	<p>If a project does not have goals, there is high chance you will not reach them.</p> <p>Defining the KPIs and regularly assessing them helps allocating efforts at the right place, all along the project.</p>

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Change Management Cycle - Overview

1 Prepare for Change

- Define your change management **strategy**
- Prepare your change management **team**
- Develop your **sponsorship model**

Change Management & Adoption Process

2

Manage Change

- Develop change management **plans**
- Develop change management **products**
- **Implement** the change management plans

3 Reinforce Change

- Collect and analyze **feedback**
- Diagnose the **discrepancies** and manage resistance
- Implement **corrective actions** and celebrate success

3

Prepare for change

Define your change management strategy

*93% of projects with excellent change management met the project objectives, vs 15% with poor change management.**

- Collect information about your existing environment, related projects, current uses, wins and pain points
- Create user personas and business case, highlighting the changes proposed.
- Provide impact analysis and recommendations, identify high-priority actions

Prepare your change management team

*When integrating Change Management to Project Management, 50% of the projects meet or exceed their objectives (vs 35% if not).**

- Provide recommendations on profiles
- Help your project Team to build and communicate a shared vision
- Define the interactions between project team and change management team

Develop your sponsorship model

*Without an effective sponsor, 71% of the projects fail.**

- Map the project's allies and opponents within the organization
- Identify the most relevant sponsor and build an action plan to help him/her endorse that role

**Source: Prosci Research*

Manage change

Develop change management plans

“A dream without a plan is just a wish”

- Define communication plan
- Define sponsorship roadmap
- Define training plan
- Define the resistance management plan
- Define the process for KPIs follow-up

Develop change management products

An architect might draw the best plans, but real people cannot live in those drawings.

- Create communication products: videos, intranet messages, emails...
- Create training materials: synopsis, e-learning site, digital community...

Implement the change management plans

Time for your content and actions to meet the final users!

- Broadcast the communication products
- Deliver trainings and create digital communities

Reinforce change

Collect and analyze feedback

Better adjust the itinerary while you're driving instead of realizing at the end that you have arrived at the wrong place.

- Create the KPIs follow-up dashboard
- Create and send surveys

Diagnose the discrepancies and manage resistance

Better be prepared before facing opponents to change. Listening is key to build your case.

- Analyze the results
- Define an action plan, based on the expected target

Implement corrective actions and celebrate success

Most users are cautious: they need to see concrete results before getting involved in the process of changing.

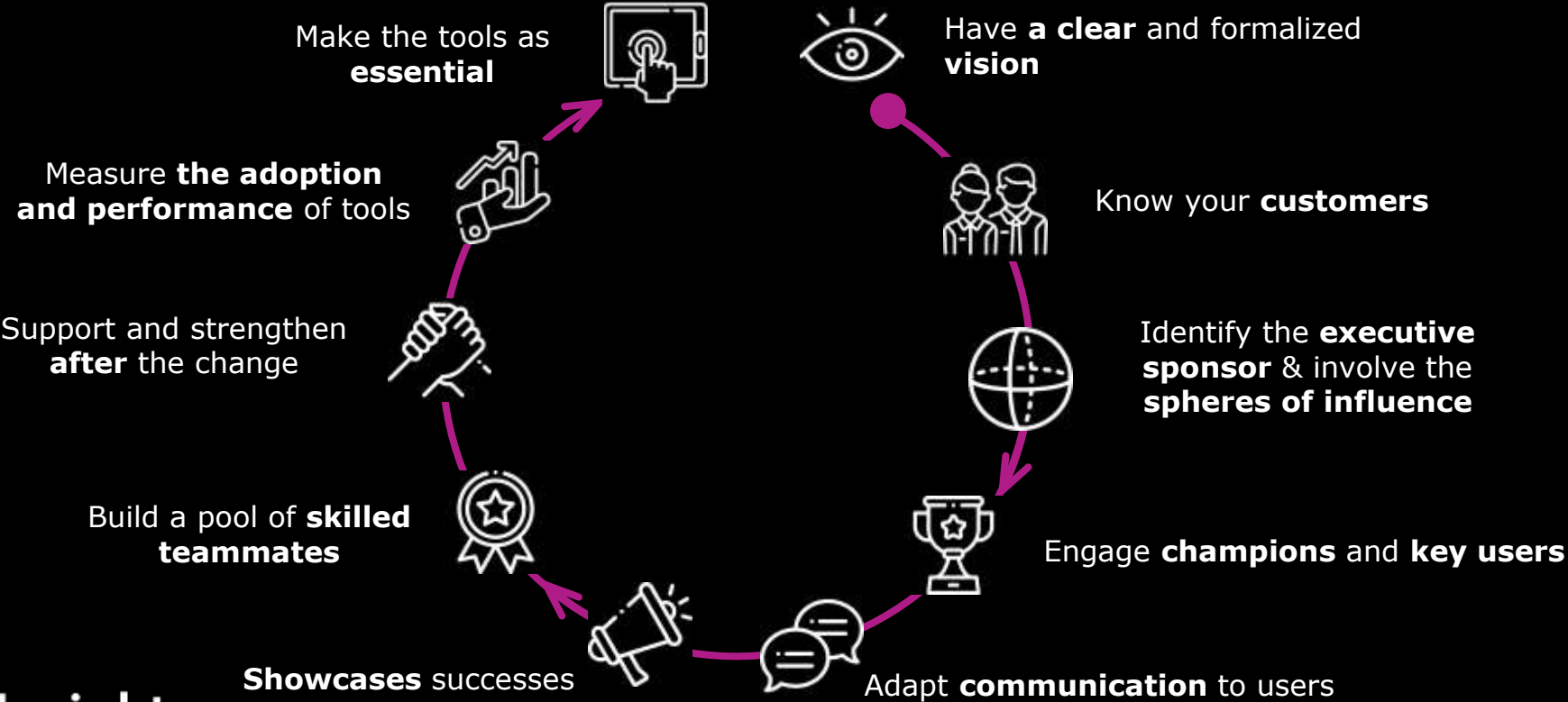
- Implement corrective action plan
- Highlight successes

A framework for a full change management strategy



	Sponsorship	Create active and visible executive engagement	✓	✓	✓
	Communication	Communicate the business reasons for change and how it will impact employees and other partners	✓	✓	
	Champions	Engage and empower key employees to be the face of change		✓	✓
	Coaching	Enable leaders and managers to have effective conversations about change		✓	✓
	Training	Gain knowledge and ability to help transition to the future state		✓	
	Resistance Management	Identify, measure and counteract resistance			✓
	Measurements & monitoring	Measure adoption rates by business unit. Analyse and define action plans to enhance adoption			✓
	Reward & Recognition	Reward new behaviours and celebrate successes			✓

Our key success factors



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What we have learned from experience

Know Your Customers

We often hear clients say...

As the IT team, we will give you all the information you need:
we know the users quite well.

Why should we listen to the users? Once we implement the solutions, **they won't have a choice anyway.**

Yet experience has proved...



Restraining your contacts to the IT profiles might give your project a **purely technical signature**, which **could discourage** other users.



Welcoming **business profiles** in designing the future solution helps building **awareness from the start**.



Users will always have the choice to turn to non-secure solutions.



Building a change management plan without the users might lead you to backtrack to adjust to the actual needs.

Feedback from a project we previously led

Context: Most of SUEZ users discovered Teams during the 2020 pandemic. Yet SUEZ wanted to reinforce those Teams uses.

What we did: Interview representative users from several Business Units, Business Lines and geographical areas to help us define the key messages and design a change management plan. Implement the actions: provide written supports, animate dedicated webinars...

Client Verbatim: "Thanks to the preparatory work we did together, people are more receptive to our webinars!"



What we have learned from experience

Engage your
spheres of influence

We often hear clients say...

I have in mind some very **advanced users**, they have developed their own solutions. They can be **ambassadors**.

I am ok to be a sponsor but I don't plan to **spend time** on it. You will ask me and we will see.

The sponsor **is not essential**.

The **CIO can be a sponsor**.

Yet experience has proved...



An absent or ineffective sponsor, 71% of projects fail; whereas with a highly effective sponsor, 72% of projects succeed.*



If the project is not embodied, users may **not understand the meaning or the benefits**.



When choosing a CIO as a sponsor you take the risk of limiting the project to its purely technical component, to the detriment of end users.



An **inactive sponsor** could have a counter-productive effect, linked to the absence of exemplarity: if managers do not make changes at their own level, why should users make the effort to change?



To **adopt a new usage** users must be able to identify with the models you present to them. Limiting the project to early adopters will limit the viral effect on other entities/departments

Feedback from a project we previously led

Context: Migration of file servers to Office 365 for all agencies in France.

What we did: Local support from branch managers and key users in each entity (nearly 520 agencies in France)

Client Verbatim: “



What we have learned from experience

Prepare your team

We often hear clients say...

We will put you in touch with an **intern**, who arrives next week.

IT is used to sending out communications: no need to ask the communication department or HR.

Yet experience has proved...



Knowledge of your **environment and culture** is essential in order to identify and solicit the most **representative business profiles possible**. It is this knowledge that will allow you to relay the voice of the users and legitimize your discourse.



Restricting the team to **IT contacts** will limit the influence of your actions. The involvement of all departments (IT, communication, HR, business...) **is essential to use the right information relays and maximize the impact of the support**.

Feedback from a project we previously led

 **Insight.**

Context: Insight initiated a transformation journey to become a Solutions Business. This implies completing successful product engagement and delivery model with complementary services and support capabilities to promote a fully integrated value chain to customers and partners.

What we did: build a cross-departments multidisciplinary team (management, business, HR...) to cover all dimensions of that transformation; sensitize managers about their role as sponsors, involve them to find allies; identify early adopters to promote changes.

Client Verbatim or Results: Onboarding all EMEA country managers

What we have learned from experience

Communicate the right way

We often hear clients say...

Change is only motivated by financial aspects, but **users do not need to know that**. They only need to be trained, to be able adapt to the new solutions.

We'll inform users through **emails**. If they don't read their emails, there's nothing we can do about it.

Yet experience has proved...



A successful change message shares what the change means to the employees (**wiifm**) and **explain the business reasons** for change.*



67% of the employees prefer being informed through a personal message **from their direct supervisor**.*



“More communication” is the most cited suggestion when we ask what organizations would have done differently regarding change management communication.*

Feedback from a project we previously led

Context: As part of a relocation to new buildings, Les Mousquetaires decided to get rid of physical phones and move to Teams calling.

What we did: Broadcast messages related to Teams as part as a wider communication plan. Diversify communication format and channels to maximize impact: videos, emails, digital posters, genius bar, specific communications towards champions...

Results: 72% users satisfied about global support. Ideas for improvement were mainly related to technical issues (ex: bandwidth).



What we have learned from experience

Provide relevant training assets

We often hear clients say...

Users need a **complete onsite training** to master all the solutions we offer.

Trainings will be mandatory. That way, we will be sure that our actions will meet their audience.

Yet experience has proved...



Less is more: retention rates are better after frequent **short sessions** than after a unique long module.



Less is more: no need to be exhaustive, and better focus on the most useful tips, that users will be able to apply.



For messages to stick, **users need to be eager to learn.** That will only occur if they **voluntarily** joined the training.



Each user has a preferred way of learning (visual, auditory, reading/writing...): **diversifying training modalities** will help addressing most users.

Feedback from a project we previously led

Context: SUEZ users were expecting guidelines to help them use Teams better.

What we did: We provided all users with various content, namely motion design teasing videos, 45mins webinars dedicated to specific Teams features and best practices, userguides and FAQ. All content was then centralized on a user-friendly IT portal. .

Client Verbatim: "The whole user journey was great: starting with a challenge, then the webinars with the associated user guides, and a survey at the end!"



What we have learned from experience

Monitor your
KPIs

We often hear clients say...

We want to see **improvements**, but we don't have **indicators** right now.

The project will be **successful** if the tools are **used**.

Yet experience has proved...



The indicators of project success and the means to measure them **must be clear to all stakeholders from the beginning**.



Regular monitoring of the indicators will make it possible to **adjust the actions and put the efforts in the right places**.



Once the change is in place, it is necessary **to listen to the users** to avoid a return to the old habits, to perpetuate the good practices... and to foresee the future evolutions!

Feedback from a project we previously led

Context: In order to measure the O365 adoption, the client needed to identify the maturity level on each direction.

What we did: We set up a PowerBI dashboard. This allowed us to target change management by population and direction.

Client Verbatim: "Thanks to your work on the dashboard, we can now set up actions by direction"

radiofrance

Tell us your thoughts!

