

Be ambitious.

Insight[®]

Digital Pioneers Programme

Learning Session 2 – Building a Change Management Plan

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Agenda

- Recap on ADKAR & Change Management Framework
- Create a Change Management Plan
 - Scope & Impact
 - Agree Activity
 - Create the plan
 - Identify Resistance
 - Deliver & Monitor
- Next Steps

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.

Our 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					✓

What is a Change Management Plan



A change management plan is a crucial component of any organisation's change management process. It outlines the sequence of tasks, activities, deliverables, and resources required to execute a change strategy while applying project management discipline through phases, workstreams, decision points, and milestones.

What does good look like?



A well-defined change management plan is essential for successful change initiatives. It ensures alignment between the change strategy and the solution, facilitates stakeholder engagement, and reduces the risk of project failure. Without a proper plan, stakeholders may become disengaged, leading to increased costs and a higher likelihood of project failure.

5 Steps to create a Change Management Plan

THE 5 steps of creating a Change Management Plan



Review the
Scope and Impact



Agree Activity
within the framework



Create the Plan



Identify Resource
& Resistance



Deliver & Monitor



What's Changing for End Users

Review the Scope

Undertake a Change Impact Assessment for your project



Change impact assessment plays a significant role in change management planning. It helps identify the **potential impacts** of a change initiative on people, processes, and technology within an organisation. A thorough assessment lays the foundation for a successful change management plan by pinpointing areas that require attention and resources.



Key components of change impact assessment include identifying **affected stakeholders**, understanding the nature and extent of change, and evaluating the impact on business operations. This assessment should also consider the **readiness** of stakeholders to adopt the change and any potential **barriers** to successful implementation.



Assessing stakeholder **commitment, adoption**, and business benefits are crucial elements of the change impact assessment. By understanding the level of stakeholder commitment, organisations can develop **targeted strategies** to move them along the commitment curve. Evaluating adoption rates helps identify areas that may need **additional support** or resources to facilitate a smoother transition.

Excel Template - Illustration

Create a template that works for you, your project and for the nature of your organisation.

Considerations may vary from one project to another so review each time

Strategic Impact Assessment

Project Name	
Project Manager	
Completed By	
Date	

State of Event/Action/Strategy	
Current State	
Resulting State Post-Change	
Gap Between Current State and Change Completion	
Key Risks	

Questions	Levels					Score
	1	2	3	4	5	
	Reach and Purpose					
What is the scope of change?	Fits with current processes, workforce, skills, minimal changes	A change to processes, staffing, models or tech	Changes to processes, organizational structure, roles	Transforms processes, organizational structure	Ground breaking, unprecedented culture change	
Is the outcome of this initiative clear?	Well-defined and clear, achievable objectives	Well defined, but objectives unclear	Defined, but objectives ambiguous	Not defined, uncertain objectives	End result unknown, objective evolving	
What part(s) of the organization is/are affected by this change?	Single function	2-3 similar functions	Cross functional, multiple locations	Entire organization	More than one organisation involved	

Impact Dashboard

Create a dashboard for project impacts that you can use with stakeholders

Describe the process change in steps



Summary of Change Impact



78



25%

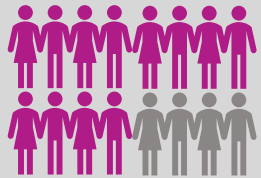


11



93

Identify the Tech change
Highlight Improvements



75%

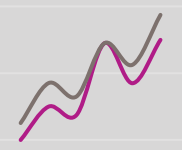
How many people from or is the change impacting?

Impacted Areas – Call it out

£40,000.00

£20,000.00

£0.00



£52k



Mindset Shift?



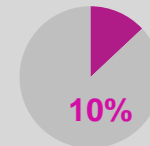
Behaviour changes?

External Factors

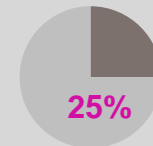
Does it impact customers?



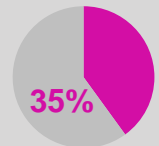
Policy Changes
Regulatory
Internal Documentation



10%



25%



35%

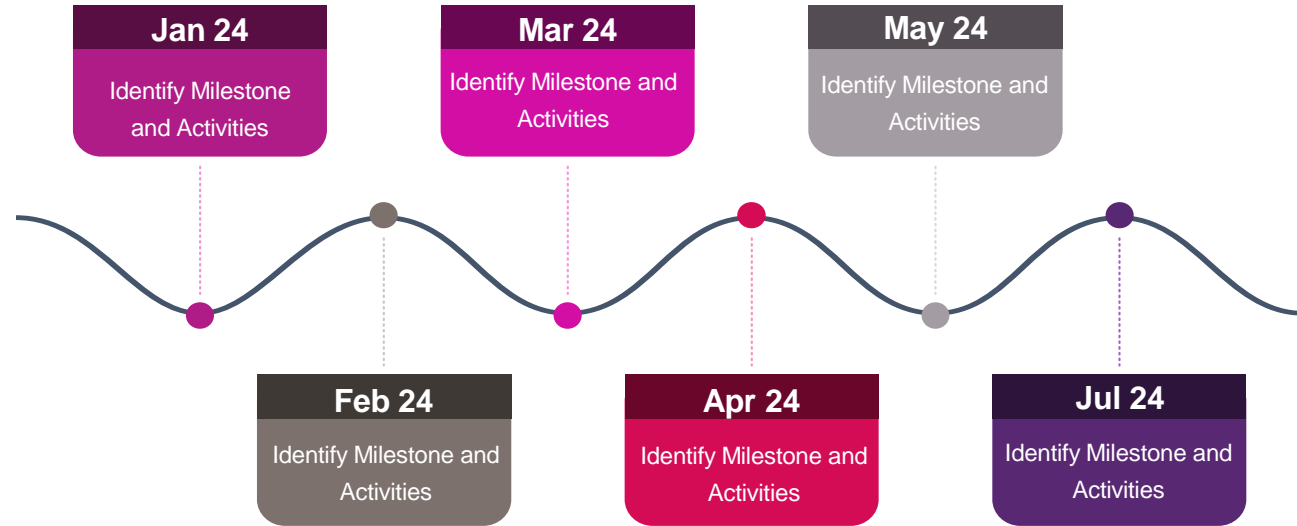
Change Impact by Department

Create the Timeline

✓ Identify Phases, workstreams and milestones

✓ Create realistic and manageable timeline

✓ Organise and prioritise tasks



Start the process of plotting key milestones on a plan so you can build it further as you explore what activity is required within the scope of the project.



Sponsorship

The Importance of Exec Sponsorship

Effective sponsorship is the #1 indicator of project success

73% of employees want to hear business change messages from senior business leaders

It's the Sponsors who help to:

- ▶ Create **Awareness & Desire** for employees who are going through this change
- ▶ Understand if what we said is what our employees heard
- ▶ Identify any barriers or resistance that is stopping us from being successful

The Role of Sponsorship

- Executives and leadership have a huge influence on culture & driving new ways to work & therefore employees' adoption of new technologies or ways of working
- Organisations that secure executive sponsors to actively communicate the value & benefit of a change are more likely to be successful
- Executive support is an essential aspect of driving end-user adoption

The ABCs of executive sponsorship

Active & visible participation

- Understand your role as a sponsor & ask for coaching support if needed
- Take part in advocating the vision to other company leaders & direct reports
- Visibly participate in conversations, training & coaching for these changes

Build a coalition with their peers

- Identify key stakeholders for executive sponsor outreach to build coalition
- Appoint co-executive sponsor(s) to help with building coalition across key business units
- Management of resistance with your direct reports

Communicate directly with their peers & employees regarding value project provides

- Outline which business outcomes the programme is driving
- Promote success stories to amplify & reinforce the impact of these changes
- Build awareness of how this change fits into your business area & aligns to your vision for your team

How do you know if Sponsors are Active and Engaged?

Communication

Communication within their respective areas is the top way of knowing if they are engaged, speaking positively about the change and addressing concerns

Attend Key Meetings

By attending the key meetings, you gain some assurance they understand the importance of their role as a Sponsor.

Take Ownership

By taking ownership of key decisions for their areas, setting out priorities and removing roadblocks.



Engage Change Team

Being available to discuss issues with the change team and providing the resources for change management.

Accessible to Impacted groups

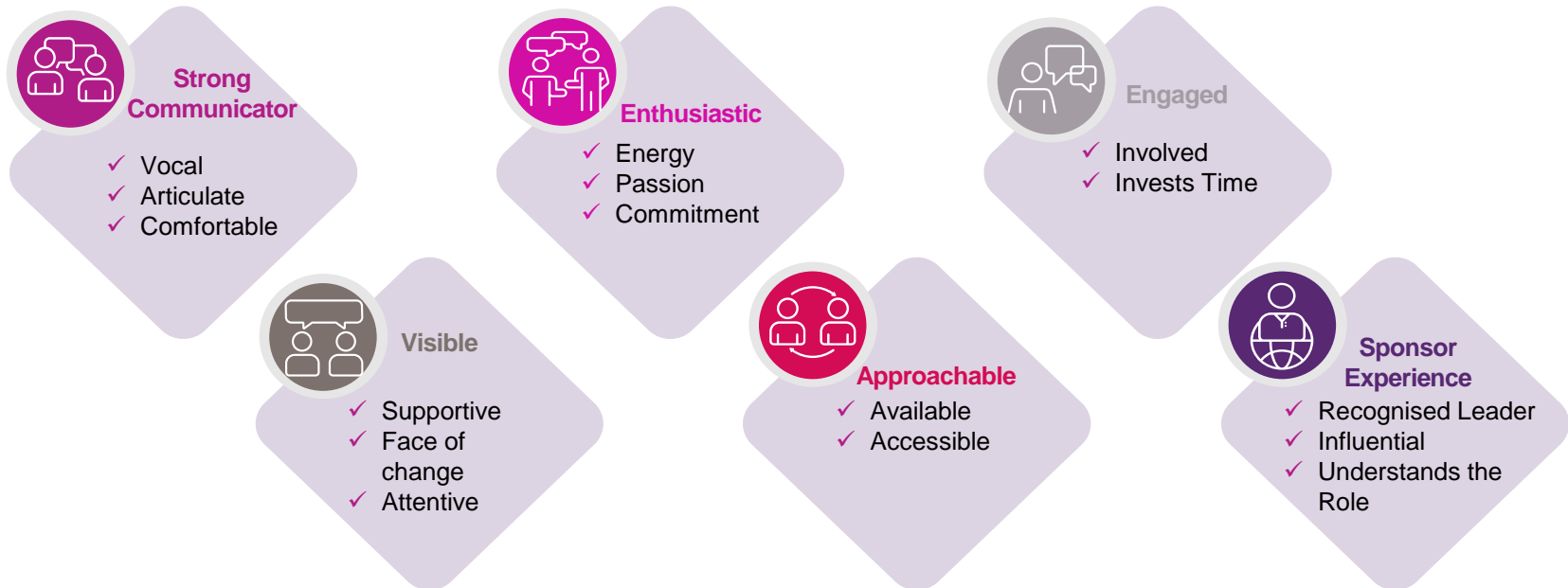
Being available to discuss issues with the change team and providing the resources for change management.

Engage Peers

Sponsors engaging their peers to build a coalition and coach managers on expectations encourages other leaders to lead the way.

Ideal Sponsor Traits

Choose your Sponsors wisely, they can make or break your change initiative





Change/Digital Champions

Why Digital Champions....

Preview of Change

Champions access and use new technology

Individual Development

Learn and grow

Department Support

Lead the way for adoption in teams and departments

Continual Adoption

Remain upskilled in new features within M365

Community of Peers

Exchange ideas and best practises

IT Roadmap

Create visibility of IT Roadmap

Culture of Change

Champions can support decision making, feedback and input into next steps and actions

Roles and Responsibilities

Roles and Responsibilities of the Digital Champion

The Role of the Champion



Share Information

Communicate information and changes to end users to strengthen engagement



Collate Feedback

Collate relevant feedback from teams to support change project.



Best Practice

Encourage adoption of best practises to gain the benefits

Why is it important



Information shared by **Peers** increases engagement and is more effective



Specific and **relevant** feedback provided by teams can be influential to decision making

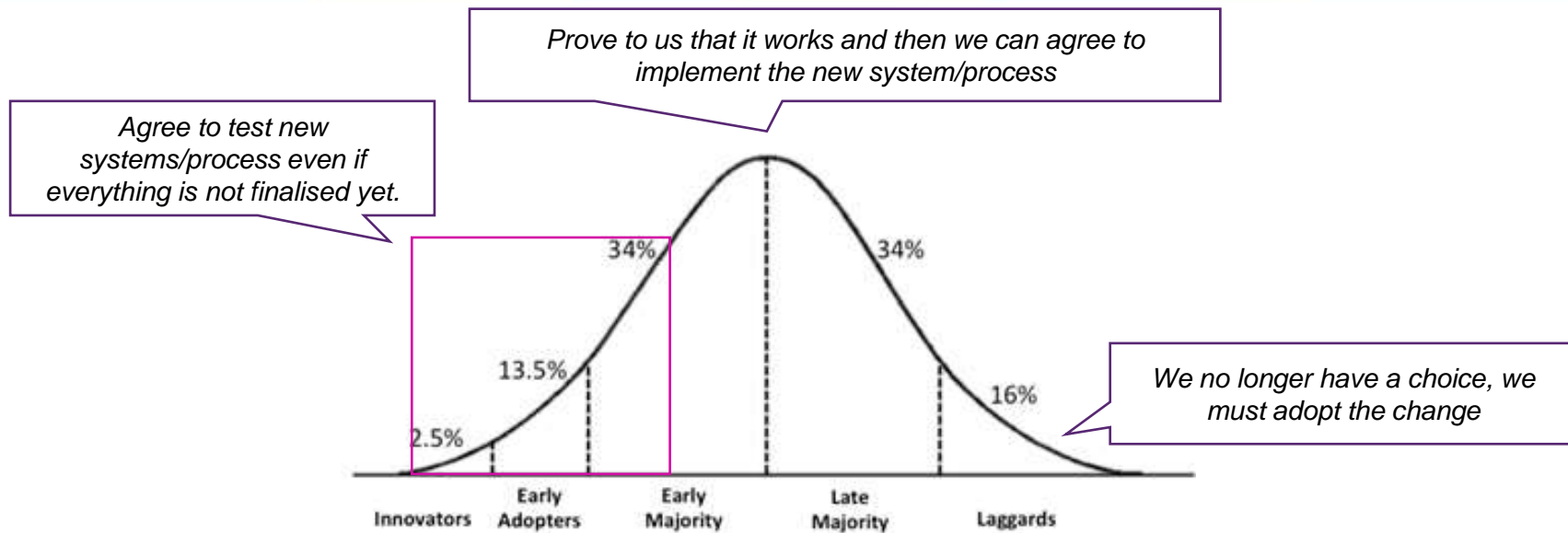


Increases **digital maturity** collectively and increases collaboration.



The network of digital champions does not replace end user support or internal training. It simply complements existing systems, to provide local support on questions related to uses and good practises.

15% - 18% of persuaded users are enough to increase adoption on a wider scale



Champion Profiles should be looked for in the first third of this graph: profiles that are both attracted by new developments and aware of the issues in the topic area

Considerations for Leaders and Sponsors



Considerations for leaders and sponsors

- ✓ Recruit suitable numbers of champions across teams and job functions for adequate coverage.
- ✓ Select champions who will have a desire to learn new skills, embed into development plans where possible
- ✓ Encourage Training Attendance
- ✓ Support time pressures with BAU
- ✓ Support Champions in advocating the change.

Communications

Communication Framework

There are six key areas within the communication framework which set out a clear view of how and when an organisation will communicate with its employees.

Objective & Goals

Understand the purpose, values and outcomes required from each communication.

Audience

Who is the for each communication.
Define the user groups.

Content

Agree key messages and understand what is important to the receiver of the communication.



Frequency & Timeline

Build a timeline for communication distribution with key milestones and target dates assigned.

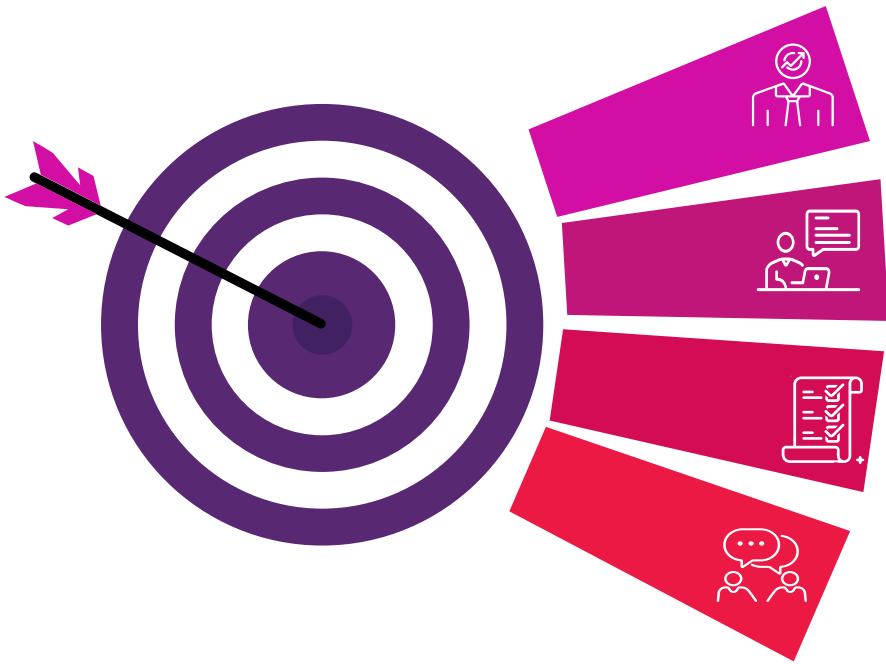
Roles & Responsibilities

Define roles and accountabilities for communications.

Channels

Agree communication channels for stakeholders and user groups.

Create your Communication Objectives



Ensure all users are 'change ready'

From the impact assessment you will understand the complexity of the change. Communications should be meaningful for end users in giving clear and focused communication on end user impacts.

Align Communications to Organisation Strategy

The changes that are coming should feel like a continuation of any other strategic communications that been shared. Users should be able to join the dots on the 'Why?'

Create an ease to the transition

Communication content should help employees move to the new changes with as little disruption as possible.

Differentiate between different Audiences

Communications should distinguish clearly between audiences as you create a plan of which communications are being sent when and to whom i.e. Leadership V's employees

Establish Communication Channels Available



Use emails to communicate the changes to employees and stakeholders as the main channel of communication.



Cascades through managers can also be used as a method to ensure the messaging is understood by employees.



Monthly Business Meetings can be used to brief the leadership team.



Posters in communal environments are effective to create conversation and chat about what's coming



The use of monitors promoting the change and engaging users into the change.

Create a Communication Strategy & Timeline

- ✓ Collaborate with the project and stakeholders to establish and appropriate timeline of communications,
- ✓ Agree the number of artefacts involved.
- ✓ Establish the roles and responsibilities of drafting, reviewing and distribution as part of the communication strategy





Training and/or Coaching

Training Suite

Digital
Champions



Group
Webinars



121
Coaching



Quick
Videos



User
Guides



Briefings



FAQ
Sheets



Ask the
Expert Sessions



Create a Training Plan



Training Needs Analysis

Identify the gap between the current and desired performance, skills, and knowledge of the target audience.



Define Objectives and Design

Define the learning outcomes and objectives and design based on agreed needs of the audience.



Develop Training Material

Collaborate with sponsors to agree preferences and develop material to suit the learning styles and preferences of the learners.



Plan Training Delivery

Plan the training delivery and logistics, such as the schedule, duration, location, facilitator, equipment, etc



Resistance Management

Resistance Management

Change management initiatives often face resistance and challenges that can impact their success.

Identifying potential resistance early in the planning process enables change managers to develop strategies to address them.

Common risks include resistance to change, lack of stakeholder buy-in, inadequate communication, and insufficient resources



Primary Reasons for Resistance

Employees often show resistance to change for five main reasons in a corporate environment. Recognising these reasons is crucial for anticipating their behaviour, which should then inform the planning and decision-making process.



Lack of Awareness

- Purpose of change not understood
- Failure of comms
- Importance of participation
- What's in it for me? Not understood



Change in Role

- Changes in job roles perceived as negative rather than positive
- Available time
- Loss of power
- Reduction of autonomy or control



Fear

- Potential job losses
- Lack of incentives
- Uncertainty
- Performance ability
- Comfort with the current ways of working



Lack of Support

- Leadership directly influences participation rates
- Managers display resistance behaviours
- Previous negative experiences



Lack of Inclusion

- Resistance out of frustration
- Voices not heard in the process of change decisions
- Communications were not effective explaining the change

Identify the Resistance



Work with your Stakeholders

Engaging stakeholders early and often to address resistance and build commitment to support business challenges.

Implementing a robust communication plan to keep stakeholders informed and maintain their support is crucial.



Identify Activity Remediate

Work through mitigants for each area of resistance identified and agree with stakeholders any additional activity required.

Ensure delivery of those agreed actions



Monitor and update

Continuously monitoring resistance updating your change management plan in response to changing circumstances shows you are listening and making changes to support.



Measure & Monitor

Reinforcement & Feedback

Determining the level of engagement among employees, managers, and leadership in your change program is crucial. Therefore, scheduling activities to reinforce the change and obtaining feedback at suitable times is key for adjusting or enhancing the change management strategy.



Leverage your champions community to understand how people are feeling and what is being understood within teams about the change.



Create feedback opportunities at all levels, use questionnaires, surveys, focus groups to measure how well users are engaged.



Rewards & Recognition

Celebrate Success

Rewarding and recognising are motivational tools that can reinforce the positive aspects of the change and encourage employees, managers, and leaders to adopt the new ways of working.

By acknowledging the efforts and achievements of those who embrace the change, the organisation can create a culture of appreciation and learning, as well as reduce anxiety and resistance among employees



Share success stories to teams.



Incentivise good behaviours, rewards small or large.



Praise in individuals and teams who are demonstrating the right behaviours, invest in the feel-good factor



Celebrate milestones



Career Development



Create the Change Management Plan

Create a Change Management Plan

Design a template that fits your project and can be repeatedly used. Dedicate time to develop the template properly to make sure it thoroughly covers all elements of a change management plan and offers a comprehensive view of the change management activities for the project.

Change Impact Assessment				CHANGE MANAGEMENT COMMUNICATIONS PLAN																																										
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Questions & Next Steps

Questions?



Organisational Change Group Workshop - 31st July 9am -11am