

“It is not the ship as much as the skillful sailing that assures the prosperous voyage.” – George William Curtis



Change Management: Leveraging the Formula for Change

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Adapted from *Organizational Transitions*, Richard Bechhard & Reuben T. Harris, Addison-Wesley

Change Formula	Action Checklist
<p style="text-align: center;">D</p> <p>Confirm Dissatisfaction with Current State</p>	<ul style="list-style-type: none"> ✓ Identify one thing about your business keeping you up at night (can be a problem/need to be solved or a desire to be realized) ✓ If you currently spend more than 20% of your time on it with no visible near-term solution, then accelerating solving it must become a priority ✓ Identify the current impact on the business with respect to each of these: Operations, technology, employees, channel partners and customers ✓ Examine any previous efforts to solve this and how they were successful or unsuccessful ✓ Consider how the business will be impacted if this is not solved ✓ Do others of your leadership team share the same dissatisfaction about this, especially a sense of urgency?
<p style="text-align: center;">V</p> <p>Define Future Vision</p>	<ul style="list-style-type: none"> ✓ Describe what would solving this look like ✓ Why is it worth it to solve this (i.e., develop a business case in terms of benefits and ROI) ✓ Does solving this fit our core purpose and focus (i.e., our mission)? ✓ Will solving this help us get to where we want to be long term (i.e., our corporate vision)? ✓ Can the company realistically solve this? ✓ Will the organization’s leadership team be committed to “owning” the change?
<p style="text-align: center;">P</p> <p>Determine Process Toward Vision</p>	<p>Alignment: Get everyone on board for the change journey</p> <ul style="list-style-type: none"> ✓ Measure readiness and barriers to change adoption with employee perception and cultural change assessments ✓ Leadership must be responsible for setting clear and unambiguous roles and expectations ✓ Communicate the Why, What and Who ✓ Eliminate competing interests, even if individuals must be removed or reassigned. Competing interests will slow or stop a change effort ✓ Determine if it can be solved with existing resources. If additional resources are needed, does the ROI justify it? <p>Have a Plan</p> <ul style="list-style-type: none"> ✓ Clearly defined roles, responsibilities ✓ Detailed timeline and milestones ✓ Metrics to track progress and achievements <p>Communication</p> <ul style="list-style-type: none"> ✓ Frequent, pervasive, relevant messaging about the change and its progress ✓ Be transparent about progress and challenges whenever possible ✓ Continuously demonstrate leadership’s commitment to the change ✓ Encourage employee feedback and have a mechanism in place to provide it ✓ Connect employee’s personal goals to emergent organizations’ goals ✓ Stay closer than ever to channel partners and customers with accelerated, personalized messaging that demonstrates empathy and appreciation <p>Execution: Actively manage change...It won’t happen by itself!</p> <ul style="list-style-type: none"> ✓ Appoint executive sponsors and change champions to “own” the change ✓ Actively manage change process plan ✓ Continuously support with tools and enablers (e.g., manager tutorials, employee gamification, learning, recognition, mobile messaging) ✓ Deploy customer and channel incentives to reinforce engagement/loyalty and counteract competitor moves