



Managing Organizational Change

LWHRA Symposium

February 9, 2016



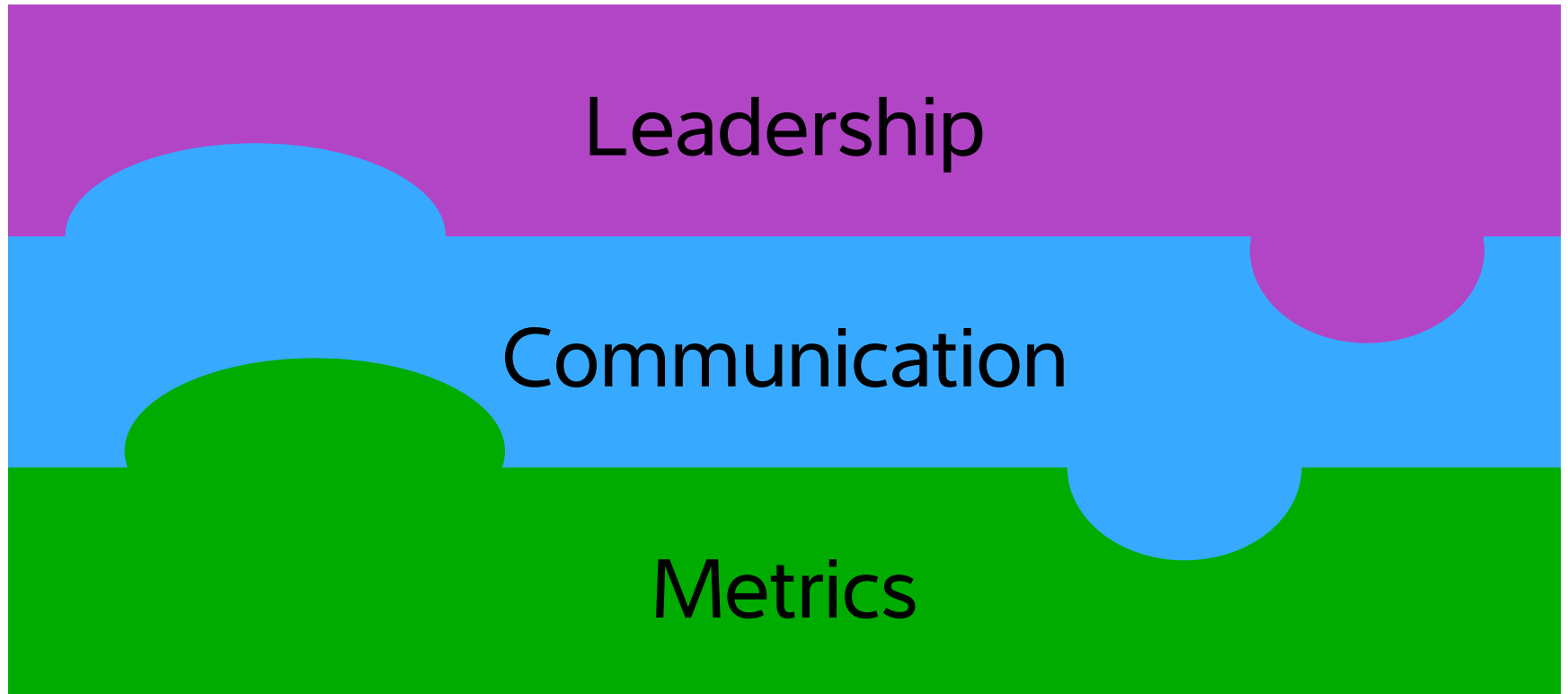
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3 Key Pieces of the Puzzle for Managing Change





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Seat at the Table Webinar Replay and Toolkit access:

- Learning the Business
- Communicating with Confidence
- Effective and Appropriate Use of Influence
- Building Trust and Credibility
- Systems Thinking & Strategic Planning
- Managing Organizational Change

LWHRA Conference Attendees Pay the Friend Rate of \$297 (that's \$100 off)



Introduction



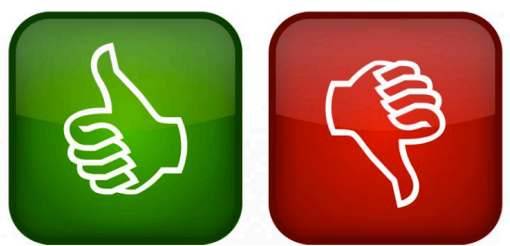
What do we mean by change?

- Merger
- Acquisition
- Closing a plant
- Moving
- Reorganization
- New product or service
- New process
- New software system
- Employee wellness program



Participant Reflection

Think back to a time in your life when you were part of a big change. Was it successful?



If YES:

- What was successful about it?
- Why was it successful?

If NO:

- What was unsuccessful about it?
- Why was it unsuccessful?



What percentage of well reasoned,
technically sound change efforts
succeed?



What percentage of well reasoned,
technically sound change efforts
succeed?

<30%



What can we do to increase our odds?

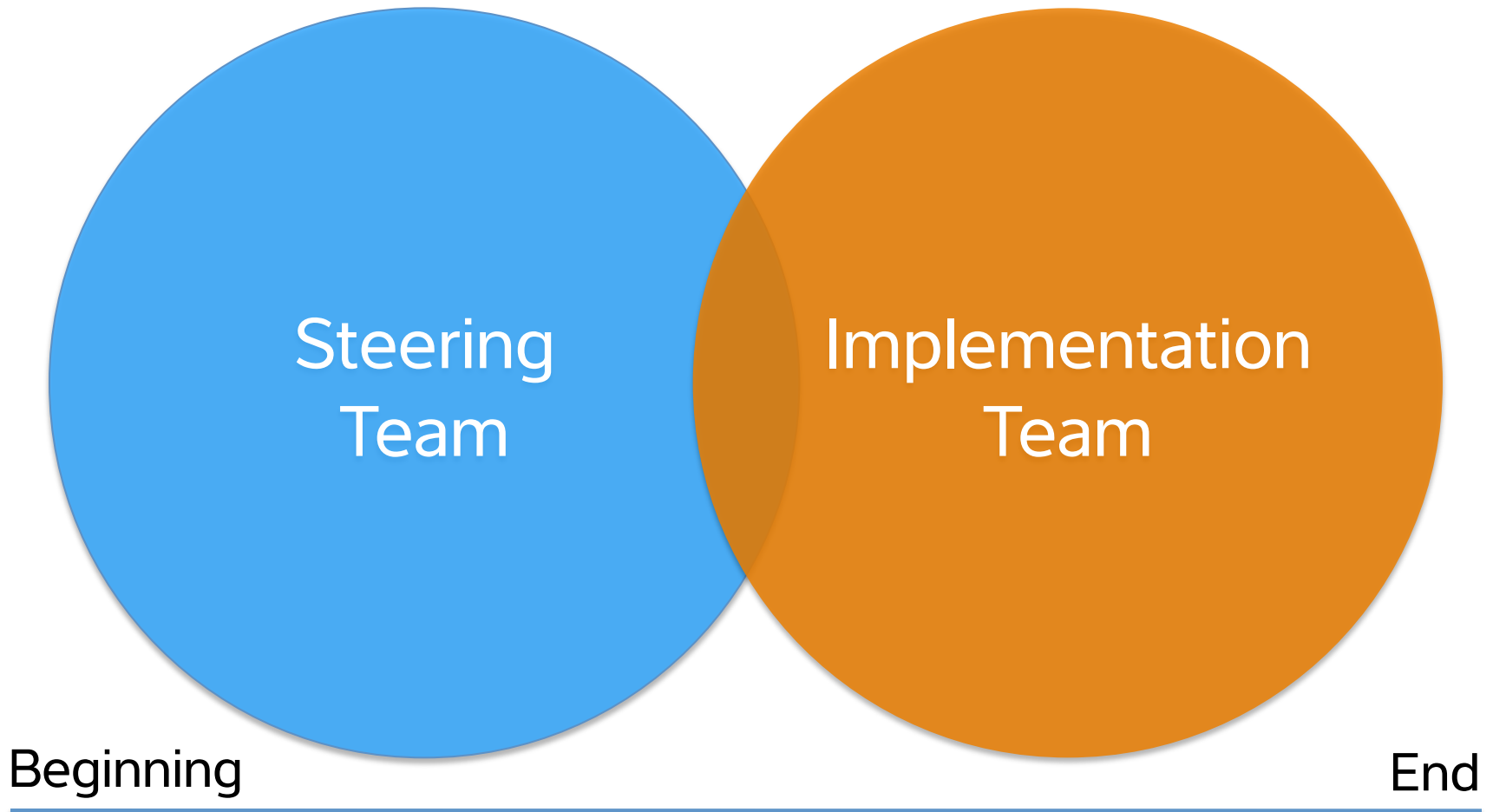
- Clearly describe the case for the change
- Articulate a compelling vision that can be understood by the audience at all levels
- Ensure there are evident, positive consequences for those affected by the change effort
- Identify specific actions people can commit to support and deliver
- Find and share the connection to the leaders' personal values to make those values believable

Kotter, John P., Leading Change, Harvard Business School Press (Boston, 1996)



Leadership

Catalyst Best Practice for Change Leadership of Major Initiative



Considerations for Potential Change Leadership Team Members



- Are they capable of providing leadership to drive the change?
- Can they influence stakeholders to support the change?
- Are they respected by others in the organization?
- Are they capable of representing perspectives that are not their own?
- Are they willing and able to remove roadblocks?
- Do they have the time/capacity to participate?
- Who is in their personal network?



Steering Team

“Champions of Change” Charter



- **Purpose** – To develop strategies to make the move go well, taking into account the staff and client experience of making a major change
- **Members and Roles** –
 - Sally: Editor (aka Conciseness Queen)
 - **Janie: Scribe**
 - Susie: Scheduler
 - Rob: Spokesperson
- **Success Criteria** – Planning, purging and packing, collaboration between programs, quality and productivity, staff to feel cared for (positive impact to quality), all to positively impact client services
- **Meetings** – Weekly. Each meeting we’ ll schedule the next time. Next is 3:15 pm Jan 20th. Three is quorum.



Implementation Team

Transition Support Team Charter



- **Purpose** – Plan, manage and communicate move details to make the move go well. Listen to staff and clients to ensure their feelings are taken into consideration and empower them to take ownership of positive solutions.
- **Members and Roles** –
 - Sally– Metrics/survey
 - Janie– Concern Register & mtg invite sender
 - Minnie– Pack & Purge Queen
 - Daisy– Written communication
 - Joseph– Jack of All Help
 - Ann– Document storage keeper
- **Success Criteria** – Planning, purging and packing, collaboration between programs, quality and productivity, staff to feel cared for (positive impact to quality), all to positively impact client services.
- **Meetings** – Weekly, Wednesdays at 3:45pm with exceptions as needed (Feb 17th, 24th). 4 is quorum.



_____ Team Charter

- Purpose
- Members and Roles
- Success Criteria
- Meetings
- File storage



Transition Support Team Run Rules

In Here

- Set meeting times to be mutually beneficial and then be on time
- Give attention to one another when they are talking
- No interrupting
- Don't personalize things
- No answering cell phones or texting
- When we are moving too slowly or down a rabbit trail, we'll say "moving along"

Out There

- What is said in here stays in here
- Be the driving, positive force
- Listen first



Communication



Case for Change Template

- What the Change Is About –
- Why it is Important–
- What Success Will Look Like –
- What I Need From You.....



Case for Change

- **What the Change Is About –**
 - We are moving Hood River staff from 3 locations to 1 brand new building.
- **Why it is Important –**
 - We will get more done and save money. It will be even safer and more comfortable for staff and clients.
- **What Success Will Look Like –**
 - Staff will be happier and we' ll be able to give clients more.
- **What I Need From You.....**



A Stakeholder is a Person or Group:

- Responsible for the final decision
- Likely to be affected, positively or negatively, by the outcomes you want
- In a position to assist or block achievement of the outcomes
- Equipped with expertise or special resources that could substantially affect the quality of the outcome



Steps for a Stakeholder Analysis

- ① Identify stakeholders
- ② Determine required level of commitment for each
- ③ Hypothesize current level of commitment for each
 - a. Actively opposed
 - b. Passively opposed
 - c. Unaware
 - d. Will let it happen
 - e. Will help it happen
 - f. Will make it happen
- ④ Communication Planning to close the gap



Stakeholder Analysis Template

Person or Group	Level of Commitment						Influencer
	Actively Opposed	Passively Opposed	Unaware	Will let it happen	Will help it happen	Will <u>make</u> it happen	
Program Mgrs			X		→ O		Mgmt Team

Rick Maurer's Energy Bar



The Energy Bar





Hartman's Performance Architecture Template

<http://youtu.be/CTjTj0M8Lmg>



Describe the **desired organizational results**

Identify a person/group who needs to adopt a **pattern of behavior**, for the goal to be achieved.

What do you know about this person or group's tendencies, preferences and perspective that may impact what he/she **thinks, feels, knows** on this topic, or how they may experience your activities?

Imagine what the person/group needs to **think, feel, know** to influence a behavior change.

Describe an **experience** that the person/group might need to have to influence what they think, feel or know.

Brainstorm **activities** you could undertake that might create the desired experience.

Hartman's Performance Architecture

NDI Example



Describe the **desired organizational results**

We will get more done and save money (give clients more).

Identify a person/group who needs to adopt a **pattern of behavior**, for the goal to be achieved.

Program Managers share resources and best practices across programs.

What do you know about this person or group's tendencies, preferences and perspective that may impact what he/she **thinks, feels, knows** on this topic, or how they may experience your activities?

They respect one another.
They aren't used to collaborating across programs.

Imagine what the person/group needs to **think, feel, know** to influence a behavior change.

The challenges that other programs are facing and how they can help.
If they give help to other programs, they'll get help.

Describe an **experience** that the person/group might need to have to influence what they think, feel or know.
Discussion amongst Program Managers about their needs and available resources.

Brainstorm **activities** you could undertake that might create the desired experience.

Structured conversation at All Staff meeting
After move, request success stories of sharing



All Staff Activity

- What are ways your program can benefit from co-location with the others?
- Go to a chart and brainstorm
- Again, plan any next steps

KH and May St



May St & 2nd St



KH & 2nd St



All 3: KH, May & 2nd St



NDI's Big Move

Portion of the Communication Plan



Target Audience	Key Messages/Desired Behavior	Date & Mode	Actionee
Program Managers	Fill out the office relocation request form for each staff member	Next managers meeting	Janet
Managers	Be a cheerleader to your staff about the move, take concerns to TST for resolution	Next managers meeting	Janet
Case Mgrs & Teachers	Be positive when talking to the kids about move You will have help. Teachers may move pre-spring break. KH needs to pack before Spring Break.	Info as avail at Staff mtgs Janet to come on Feb 8	Janet to talk to Larry, Barb & Lynda to schedule day off. Leah to tell them.
Non-staff stakeholders (vendors, clients, donors)	Call, visit or mail to us at our new location.	"We're moving" postcard card	Heidi
The Dalles Staff	Your building needs will be addressed soon after the HR move	Email – Feb 7	Janet
All Staff	Timeline Purge now, get ready to pack your space & anything assigned by your mgr, moving company is moving us Want to see the progress?: Sign up for a hard hat tour, photos are on my blog. Confidential materials will have a specific protocol – stay tuned Leave your computers. IT will handle it Dogs will be welcome – stay tuned for the protocol Please take the survey	Feb 2 All Staff All Staff Emails	Janet



Communication Planning Template



Target Audience	Key Messages/Desired Behavior	Date & Mode	Actionee



Metrics

Catalyst Best Practice

Considerations for Assessing Change



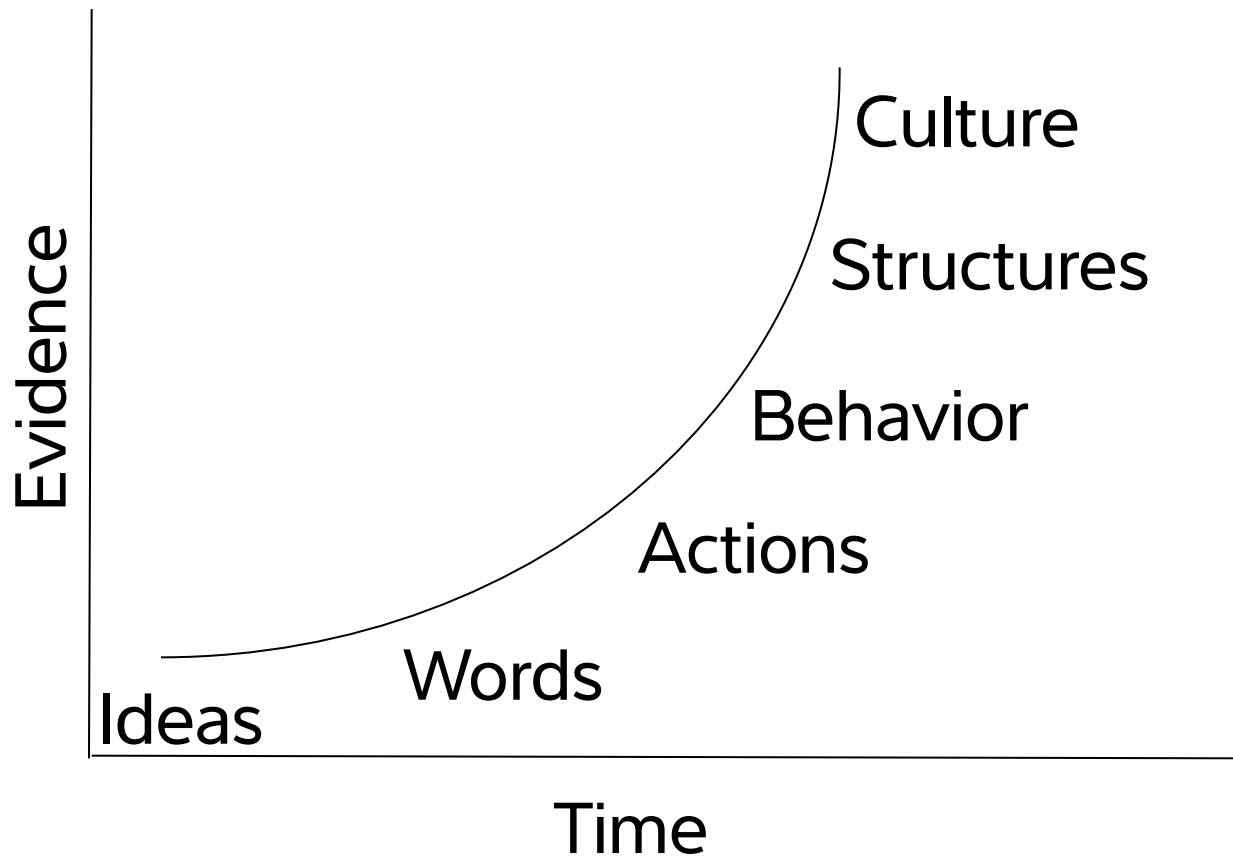
- Snap a baseline before the change so you have a comparison
- Measure as close to results as possible, not just activity
- Measures don't have to be perfect; indicators usually suffice
- Collecting data is not a neutral experience



NDI Metrics

- Pre and post survey
 - Current workspace is good 23% (pre), 59% (post)
 - Space for private meetings is good 9% (pre), 72% (post)
 - I' m happily sticking around 23% (pre), 69% (post)
- Post-move check-in: sticky notes
 - Save money
 - Save time
 - Give more to clients

A Case for Existence Structures





In Summary

- Change is hard and messy
- You can help make a difference
 - A compelling purpose
 - Inspiring team
 - Thoughtful communication
 - Metrics that matter