



Seven Steps for Successful Change Management Strategy

A Workable Process for Change

Executive Summary

The Association of Change Management Professionals® (ACMP®)¹ Standard for Change Management®² provides a thorough guide to developing a change management strategy. The Standard was built from the ground up by a working group of over 1,100 change management thought leaders and volunteers from 57 countries, each averaging more than 10 years experience.

In this document, jTask Inc. unpacks the ACMP Standard elements of change management strategy, and adds our own advice as experts in Change Management, just as we do when working with our clients.

The ACMP Standard for Change Management separates the change effort into five major areas that are:

1. Evaluate the Change Impact and Organizational Readiness
2. Formulate the Change Management Strategy
3. Develop the Change Management Plan
4. Execute the Change Management Plan
5. Complete the Change Management Effort

At jTask we think *Formulate the Change Management Strategy* is the most important part of the Change Management process. The strategy needs to be correct for any change implementation.

We have explored the issues to help you select the right approach in each key step to build your change management strategy.

A New Approach to Change

As a leader of your organization, you already know that change is inevitable. Whether it's changing one step of a process, overhauling a department, or making a complete business transformation, change is an important part of growth, development, and success.

Of course, change is a complicated process, with the potential for great success or failure. It's too important to leave it to chance, do what you've always done, and hope everyone will get on board with the change. You need a structured and comprehensive strategy that can reliably bring you to the benefits of your change.

The Association of Change Management Professionals (ACMP) recognized the need for consistency of process when they recently published the

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1. The ACMP Standard for Change Management was published by the Association of Change Management Professionals in 2014. The entire ACMP Standard is available at <http://www.acmpglobal.org/TheStandard>.
 2. Italicization in this document reflects a direct quote from the ACMP Standard.

ACMP Standard for Change Management. This Standard codifies the best practices for managing change in organizations, and provides a solid change management process. As change management professionals, we've reviewed the ACMP Standard thoroughly, and are now recommending it to all of our clients.

There are many change management models, and many different ways to manage change and transition. We believe the ACMP Standard is the best guide. As we reviewed The Standard, we recognized that it would be useful for professionals facing a change to have access to a detailed breakdown of one section of The Standard—developing the change management strategy.

The ACMP Standard recommends creating a change management strategy that encompasses seven distinct areas of focus. At jTask Inc., we bring our considerable experience to The Standard, giving our clients our best advice to get the most out of it. The Standard identifies where strategy is needed, We provide the things to consider in yours, based on our experience.

Within your organization, there are already people and groups with knowledge domains for the change team to draw on in order to be most effective. The people within your organization with sales, marketing, communication, training and project management skills all have knowledge that can help inform and improve the change management process, including creating your strategy. For example, learning specialists can consult on your learning and development strategy, sales and marketing specialists can coach you in engaging executive sponsors, and project managers can share their experience in managing complex scheduling requirements. Take advantage of this knowledge.

A Word About Risk

Risk is an inherent part of business and any change effort. The money and effort you put into your change management effort is based on the operational business risk. The higher the risk, the more you need to invest in your change management effort.

There are several factors to consider to determine the operational risk. These include:

- ◆ the strength of the case for change
- ◆ the required amount of sponsorship engagement
- ◆ the degree to which the success of the project depends on behavior changes
- ◆ the degree to which the success of the project depends on stakeholders learning a new skill
- ◆ how much the change affects stakeholders, customers, and vendors
- ◆ the amount of financial impact the change has on the organization
- ◆ the amount of prior experience the organization has with change

When you understand the operational business risk of your change, you will see where to expend the most effort. You may determine that there are areas of your strategy that will not require any effort at all.

When your analysis of the risk determines that no effort should be expended in a particular area, it is important to document these decisions, so that as the change is implemented all key team members and executives can understand the strategy.

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What About Workstreams?

The ACMP Standard briefly discusses change management workstreams and highlights a list of them that includes sponsor accountabilities and activities, leadership alignment, stakeholder engagement, communication, organization and process design, culture and behavior change, impact assessment and management, readiness planning, learning and development, performance management, risk management, and benefit realization and sustainability management.

As defined areas of your change management strategy, workstreams can help you evaluate the status of your change management plan. You can use workstreams in a number of areas of your strategy. For example in the sustainability area, you could list your workstreams and then determine what your approach is against each workstream over a quarter by quarter timeline, for a one or two year period.

Get Strategic

Our experience has shown us that some approaches aren't strategic enough—they aren't comprehensive, they may not offer benchmarks or other measures, or they may leave out entire areas that are essential to managing a change. This leaves your organization open to avoidable problems with the change, including:

- ◆ Incomplete user adoption
- ◆ Unrealized benefits of the change
- ◆ A change management process that is longer than necessary
- ◆ Wasted time and resources, and a loss of productivity
- ◆ Frustrated, disengaged stakeholders

Instead of taking unnecessary chances with your change management process, using a comprehensive and strategic method will give you the best opportunities to see the benefits of your change in reality.

The Seven Steps to a Successful Change Management Strategy

The seven areas the ACMP Standard identifies as crucial to a change management strategy are:

1. communication
2. sponsorship
3. stakeholder engagement
4. change impact and readiness
5. learning and development
6. measurement and benefits realization
7. sustainability

After you have selected your strategy in all your areas identified in the ACMP Standard you will be able to develop your change management plan. Strategies do not need long and complex. The most successful are often the simplest. As you develop your strategy it is often about what you decide not to include not what you include.

1. Develop the Communication Strategy

Part of the reason people often resist change is because they don't understand exactly what is happening. By defining the strategy of how you will communicate the change throughout the change management process, you will provide a consistent, well-timed message.

Developing the communication strategy *ensures that the organization and its customers are aware of and understand the organizational rationale for the change*; ensures that stakeholders are aligned regarding the program's expected value and benefits to the organization, initiation, progress, challenges, achievements, completion, and realized benefits.

Coaching sponsors and executives in your communication strategy prevents misunderstandings that can impact your change effort. Imagine that you have created a communication strategy that entails beginning change communication with different regions at different times. While change communication has begun at your headquarters already, it won't roll out in some regions for a few more months. If executives who aren't coached in the communication strategy go on a roadshow, only to find out that employees in one of these regions seem to know nothing about the change, they may draw incorrect and damaging conclusions. They might think the change management team is unfocused or behind on communicating the change to this region. If they haven't been trained in communicating the change, they may try to update this group of employees on their own, deviating from the messaging that has been decided on. Instead, if they understand that the plan is to begin change communication to that region later on in the process, this can be avoided. If they are coached in what to say about the change, your effort can continue smoothly, without misinformation.

Your communication strategy will play a large role in how stakeholders regard your project. It establishes what they will know, when they will know it, and how the information will get to them. A detailed communication strategy saves a lot of trouble—it keeps everyone on the same, correct page.

A communication strategy is best when it is:

Specific – Your strategy should include as much detail as possible, especially about deliverables. Simply deciding to include a monthly email newsletter is not enough. “Newsletter” could mean different things to different people. Instead, describe the deliverable you will create. “A monthly email newsletter with a 2-3 paragraph project report from Jean and one photograph” lets everyone know what to expect.

Based on Past Success – If you know for a fact that your staff regularly misses emails, but responds well to reports from



team leads, sending them emails is not going to help your change management. Instead, look at the modes of communication that have worked best in the past, and plan with those.

Clear About Timing and Schedules – One of the first things to communicate to your stakeholders is exactly how often they can expect to hear about the change. The frequency of communication may be different for different groups of stakeholders, depending on their involvement in the change, or its impact on them. Your strategy should spell this out explicitly. With clear expectations about when they'll be updated on the change, you'll avoid the dreaded response: "Oh, is that still happening? I hadn't heard about it in awhile, so I didn't know."

Inclusive of Crisis Communications – All communication strategies should include a crisis communication item. If there are elements of the change that could lead to an organizational crisis, consider how you'll talk about them before they happen. Identify when and how key stakeholders will be informed of the situation, language used to describe the situation, and how the information will be released within your organization, and externally, if appropriate. No one likes to consider worst-case scenarios at the beginning of something new, but if the worst does happen, this preparation will be invaluable.

A thorough communication strategy that encompasses these elements will save you a lot of troubleshooting. When people don't know what to expect from a change in the workplace, they tend to move right onto rumor and speculation, as well as becoming suspicious of the change.

Your communication strategy clarifies marketing the program within all groups of stakeholders. Executives should be trained in the communication strategy to make sure they know what to say about the change and are delivering it properly. Change agents, trusted people from different areas of the organization who function as peer leaders, can use the communication strategy to market the change within their peer group while staying on message.

Who is the Sponsor of the Change?

To determine who the sponsor is, it may be useful to think about the future state of your change. After the change management process has been completed, which person or group will still be accountable for realizing the benefits of the change?

The individual or group in the organization accountable for the realization of the benefits of a change is the sponsor. While many people or groups may bear some responsibility for the change during the process, most will have reduced their time or ended it after the change has been completed. The sponsor will need to continue to invest in the change to ensure the benefits are realized.

2. Develop the Sponsorship Strategy

For the purposes of this document, a sponsor is the person or group accountable for the realization of the benefits of the change. A sponsor is a distinct sub-set of stakeholders. While others will have responsibility for the change, the sponsor's accountability will last beyond the completion of the change management process.

A Sponsors can make or break a project, because everyone else will take their cue from the sponsor. *Stakeholders want to learn about the change and the reasons for the change from the sponsors.* They determine how important the change is from the importance the sponsor places on it.

Due to their high-level position within the organization, the sponsor is able to *build support for the change at all levels.* The sponsor provides the resources and budget for the change, sets expectations, and holds the organization and individuals accountable during the change.

The sponsor can *identify risks associated with resistance to the change*, but, unlike other roles, has the authority to mitigate those risks, break down barriers and remove obstacles that restrict change implementation.

The sponsorship strategy describes how to align the sponsor to support and own the change. This is crucial to success, because without a strategy, the change is dependent upon the natural ability or inclination of the sponsor to support the change. With a strategy in place, appropriate care can be taken to make sure the sponsor is communicating and supporting the change in a useful and effective way.

The sponsorship strategy should include:

- ◆ A plan for coaching or training the sponsor in communicating the change—For sponsors to be successful, they need to know how to communicate the change. They must be fluent in the impact of the change and its expected benefits. They must understand the goals of their communication and its relevance to each of the audiences to whom they present it.
- ◆ Opportunities to ensure the sponsor is engaged and cascading information correctly—Wherever possible, we recommend face-to-face meetings and workshops to coach the sponsor. This gives sponsors the opportunity to practice delivering the message, and



Change Agents

Change agents are another stakeholder group, that are selected to support the project team implementing the change. They are generally people who will be affected by the change. They are trusted, knowledgeable, and influential within the organization. They communicate and model the change to peers, and provide feedback on the change. They are not accountable for the benefits of the change as sponsors are, but they play a large role in engaging their fellow stakeholders in the change.

gives you the opportunity to make sure their messaging and knowledge are correct. It also gives the opportunity to help the sponsors package the information in the best ways to reach each group of stakeholders. This support should be continuous from the very beginning of the project until the change is implemented, and even after. The impact of the sponsor is too important to leave them to their own devices and hope for the best.

- ◆ A solution for a potentially disengaged or resistant sponsor—As the person or group accountable for the realization of the benefits of the change, it is usually in the best interest of the sponsor to engage with and support the change. Sometimes, however, for whatever reason, they won't. If you observe the potential for this behavior, you need to view it as the significant risk it is. Determine the appropriate level of team executive to engage with the sponsor directly, and identify actions to reduce the risk of the situation.

3. Develop the Stakeholder Engagement Strategy

A stakeholder is *an individual who is affected by the change*. Some stakeholders, like your employees, may have the day-to-day duties of their jobs affected by the change. Others, like partnering vendors, may observe minimal differences when the change is implemented, or the reverse could be true. Each stakeholder must be engaged with the change according to the amount of impact the change will have on them.

A stakeholder engagement strategy will *describe how to engage individuals or groups impacted by a change and those who can positively affect the overall success of the change in the change effort*. Stakeholder engagement is essential to eventual user adoption. Stakeholders who are engaged throughout the change management process are people who are ready for the change. This readiness lays the groundwork for the user adoption and benefits you're hoping to realize.

On large projects, it may be impossible to engage with every single stakeholder. In these instances, we recommend engaging with key stakeholder groups who will carry the message to the rest. On projects of all sizes create a change agent strategy of engagement, by matching the stakeholder relationship ownership to the level of stakeholders.

When deciding on the amount and frequency of engagement with each stakeholder group, consider the perceived risk of the individual or group not supporting the planned change. How much damage would be done if they did not adopt the change? The amount, frequency and governance of engagement should be in direct proportion to that potential: the higher the risk of adoption the more engagement is required.

4. Develop the Change Impact and Readiness Strategy

The Change Impact and Readiness Strategy defines *the approach, scope, roles, and responsibilities in undertaking detailed impact analysis and readiness planning for implementation of the change*. It is divided into two sections, change impact and readiness.

To understand the impact of a change, it is essential to understand the *how the change affects people, processes, tools, organization structure, job roles, and technology*. This specific understanding will influence every part of your strategy and is critical to the success of change projects.

Without a strategy for addressing the change impact, you are set up for surprises at every turn. Seemingly small things can end up changing entire job descriptions, rerouting processes, or causing unplanned expenses that bring you over budget. Moreover, this kind of unforeseen impact can have a negative influence on stakeholder engagement and general perception of the change—instead of the message you're trying to communicate, you're sending the message that you didn't really think it through. By understanding the impact of the change, you'll ideally solve problems before they actually occur. You'll be able to answer questions when they're raised, and make the change as smoothly as possible.

Once you've figured out the impact of the change, we recommend creating an impact statement. The level of detail should be matched to its intended audience and how many changes affect them. It should be agreed upon by the entire team. Most helpfully, it should include a summary list or tables of all changes. Having access to this impact statement allows stakeholders to understand exactly what the change means for them.

Readiness is the second section of this strategy. It's important to verify the organization is ready for the change. To do this you should evaluate the completion of effort in each of the change management workstreams. Have all communications been sent, has all Learning and Development Activities completed.

Together, the elements of change impact and readiness will form a sure foundation on which to build your change. Without them, the rest of your strategy will be groundless.

5. Develop the Learning and Development Strategy

The learning and development strategy *defines the knowledge, skills, and competencies required for stakeholders to adopt the change*. These components determine what kind of learning and development programs should be undertaken, including, but not limited to, training courses. Some change efforts may require extensive learning and development

Possible Learning and Development Methods from the ACMP Standard:

- ◆ *Instructor-led (face-to-face and virtual)*
- ◆ *Computer-based*
- ◆ *Webcasts/Podcasts*
- ◆ *Role plays*
- ◆ *Simulations*
- ◆ *On-the-job*
- ◆ *Gamification*

When Your Measures Show You're Not on Track

Your measurement and benefits realization strategy should include courses of action for when you observe slowness in reaching a goal or slippage from a target,

It is also wise to include an approach to revising or replacing performance targets if you learn the old ones are no longer relevant.

for stakeholders to successfully adopt the change, while others may be minimal. However, it is important to consider what your stakeholders will need to be able to do or understand for the change to be successful and how you intend to present that information to them.

The type of training is determined by the type of change and the level of risk involved. Changes that pose a serious risk to safety or productivity usually require more extensive training. In these instances, you may find you require hands-on training sessions, supervision, and assessments to ensure that the level of training is adequate to the change. Lower risk changes may only require a single seminar, or completing a self-guided training module.

6. Develop the Measurement and Benefits Realization Strategy

The Measurement and Benefits Realization Strategy provides timely information to gauge the effectiveness of the change strategy, keep the change implementation on track, allow for course correction, and ensure that benefits of the change actually occur. The Standard divides this aspect of change management strategy into three parts:

1. Measurement strategy for the change.
2. Measurement strategy for the effectiveness of the change management strategy.
3. Benefits realization strategy

The first part of the measurement strategy involves setting targets based on the goals of the change and its expected benefits. They should be quantifiable and specific. This part of the measurement strategy ensures that everyone within the organization has a shared understanding of what is or is not successful. We recommend you develop these targets in consultation with project and subject matter experts.

It is likely you will want to include both user adoption and behavioral change in your Measurement Strategy. Each supply you with important information about the change. Indicators of user adoption like clicks on a web link and logins to a new program show you whether or not the change is being made. Indicators of behavioral change demonstrate how the change is being made, and if existing behaviors have been replaced by the desired ones. The important part of identifying the benefits is to convert them to goals and associated metrics that can be measured.

The second part of the measurement strategy is to measure the effectiveness of the change management strategy itself, while it is happening. This allows for course correction if something is not working out and the option of refining the process for greater success. Incorporate stakeholder surveys, focus groups, and other mechanisms for feedback during the process to make sure the change management strategy is working the way you want it to.

Finally, you'll need to consider your benefits realization strategy. A benefit can be understood to be any desired outcome of a change. Realization of the benefits, then, is achieving these expected outcomes. While you cannot measure the benefits before the change happens, you can determine who will own each target, the method and frequency of data collection and reportage, and how you'll communicate your performance targets to the rest of the organization.

7. Develop the Sustainability Strategy

Before you've even started the change effort, it is important to consider what happens after implementation. The sustainability strategy *describes how the change will become part of the organization's normal functioning*. At some point, the change will no longer be a change—it will just be the way things are. To be sustainable, it must be decided how the change will continue to be managed after the initial change management process and how the various workstreams will continue. This ensures that the benefits of the change will continue to be realized.

Once the change is implemented the support of the change sponsors will remain very important. The sponsor continues to be accountable for the benefits of the change, and must be engaged in reviewing the expected measurements, rewarding successes, and taking corrective action if measures are not met or the change goes off-course.

The sustainability strategy serves the critical function of preventing an eventual drop off in user adoption. Without a strategy for sustaining the change, you run the risk of users gradually transitioning back to previous behavior, or otherwise jeopardizing the benefits of the change. This is particularly dangerous if funding and resources are reduced. It is common for activities like proactive communication and training to be eliminated if funding is cut, but these are part of what makes a change sustainable. If your resources are reduced, carefully watch for changes in the measurements of your benefits. If you see an area where benefits are beginning to reduce, focus your efforts there.

Succeeding with the Seven Steps of Strategy

Leading an organizational change or business transformation can be daunting, but with a solid strategy, you'll put yourself in the best position to succeed. We believe the ACMP Standard for Change Management provides a thorough guide to developing a strategy.

About jTask

jTask, Inc. is a Silicon Valley based corporation. We provide Change Management consulting, software, and training to organizations that need Change Management support to accomplish and realize the benefits of their Business Transformation.

jTask consultants are trained in Change Management standards developed by the Association for Change Management Professionals. We use our own cloud-based software, to accelerate the process, allowing our customers and us to focus on the value add activities.

Whether you need to set up a change management function within your organization or need change management support on a project, jTask stands ready to help you successfully realize the return on your investment in Change.

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