SUCCESSFUL CHANGE CHANGES EVERYTHING

Change Agent’s Guide to Change Management
A well-managed change must be understood to be a disciplined process with four major action steps.

Change Management is a Process

While many effective change management practitioners operate on instinct and experience, we have found when we analyzed what they do that there is a structured process flow to their activities which even they may not be aware of and may not be visible to others who watch them and wonder, “Why did she do that? Why did he do this now instead of earlier (or later)?”

We at LaMarsh Global argue that making that process visible is valuable to those experienced individuals to ensure they do not skip any of the steps in the process. Equally important a visible, defined process is critical to individuals for whom the action steps of a well-managed change are not intuitive, who operate best when they follow a defined set of actions. And there is another reason. More and more organizations today are committed to building effective change management as a basic capability through the organization. This, by definition, calls for a common methodology that is visible and accessible to everyone involved in the change: the change management practitioner, the project team members, the leaders and managers who will be sponsors, and the people impacted...the targets of the change.

The four steps in that process using the LaMarsh Global Managed Change™ Methodology:

**STEP ONE**
Determine the Resources Required
- Key Role Map

**STEP TWO**
Put the Governance in Place

**STEP THREE**
Apply Managed Change™
- Identify the changes to be made and who is to make those changes
  Current and Desired States
- Determine the existing or potential resistance
  InfoMatrix
- Design and implement the action steps to prevent or mitigate that resistance
  Communication
  Learning
  Reward/Reinforcement

**STEP FOUR**
Exit the engagement
- Sustainment Plan
- Exit Strategy
LaMarsh Global Managed Change™ is the core of this methodology, so let’s examine it in greater detail.

The goal of the Managed Change™ Methodology is to reduce the risk of failure, the possibility that the change will be less than fully successful or might even collapse because of the difficulty people have accepting the change. The way to prevent that or at least seriously reduce it is to enable people to make the choice to willingly embrace the change and to be able to successfully change. How do we do that?

**STEP ONE**

**Determine Who Will Be Impacted by the Change**

First, we need to find those people who will be impacted, what we at LaMarsh Global call the targets of change. While the size of the change and the size of the population affected are critical to determine the resources required to do change management, this list of targets, identified in a tool we call the Key Role Map, considers everyone impacted, whether the change is large or small for those groups or even individuals. The size of the change does not dictate the reactions of the people affected so it is critical to identify and consider all populations impacted.

A new technology which dramatically changes key processes for many people may not trigger a great deal of resistance in the population required to make the most change BUT could cause another group, for whom the changes are minimal, to experience massive resistance.

So this first step is to find and list everyone who is going to be impacted. And don’t forget those outside your organization: customers, vendors, government, media, community – any groups that will be different because of the changes you are making.

**Separate the people impacted into one or more categories of roles and then:**

- Assess the willingness and ability of leaders to be sponsors of the change
- Assess the willingness and ability of members of the project team and other change agents to address the needs of the people going through the change
- Analyze the orientation of the various target populations toward change in general

**STEP TWO**

**Put the Governance in Place**

One critical source of resistance is the experience that people have had with previous changes. Many have learned to mistrust the process of change based on their past experiences. There are many things that have to be done in a well-managed change to diffuse that perception. One critical one is the project governance that is put in place.

A well-structured governance will enable the change management person/team to be integral to the project structure. In this diagram you can see how change management sits at the program or project team level and works also with the sub-projects or work streams or geographies or business units working on the change. (figure one)

**STEP THREE**

**Apply Managed Change™**

**Identify the changes to be made**

*Current and Desired States*

The third step in a well-managed change is to use the Key Role Map built in Step 1 and systematically determine for each group what are the sources and degree of existing potential resistance.
Consider these two sources of resistance that LaMarsh Global has identified in our years of working with target groups all over the world, in every industry and for every type of change.

**Determine the reason(s) for leaving the current state**

Why is this a key activity in a well-managed change? If the targets cannot understand or cannot accept the need to leave their current state why would they leave it? This is the first source of potential resistance in each target group. The project team’s charter should have this information but our experience is that it is defined from the organization’s perspective. Targets need this argument for change defined from their more local, even, personal, perspective. If they feel their jobs are being done well, their department or plant is operating successfully, and it is others who are contributing to the problems the organization is having they will resist. If they can’t see the immediate or ultimate consequences to THEM if things don’t change they will resist.

**Define the desired or future state**

In order to choose to support a change project and to choose to change, it helps a great deal for people to know what their future state will be like – for them.

Take the work done in making the decision to change that defined that future and ensure that it is represented in a way that will be meaningful and understandable to the various target populations.

If that desired state is not attractive to certain populations make sure that the balance of reasons to leave the current state and the choice of the desired state are clearly articulated: that even an unattractive desired state is better than staying in the current state. This is a hard message to get across but if it does not exist the change should be reexamined.

**Design a plan to help people through the delta, the transition, the implementation**

- Even people who welcome and are willing to change may find it difficult, resulting in resistance. There are many reasons for the resistance that can develop in the delta phase. One is the fact that the change and the effort to change take time and attention away from the day to day work.

  “What do you want me to do, get my work done or spend time learning the new way to do the work?” A legitimate question. If we don’t address it many people will chose their ‘day work’ because that is what they are being measured on and those measures were not adjusted to align with the new current state.

- If there are multiple major changes going on that impact a particular target group, and if those changes are not being coordinated by the project teams and leadership, the targets are left with the need to prioritize and determine which should get their attention. Their prioritization will, naturally, be based on their own interpretation of what is important, which may or may not be in the organization’s best interests.

- It is in the implementation, the delta, that the majority of the targets’ work is done. If their experience in past changes is that the work they do to change is not worth the effort, they will not be willing to make that investment.

**Determine the existing or potential resistance InfoMatrix**

It is a simple tool but the most important one in the change management practitioner’s bag of tools. You know who the targets are, you know what the sources of resistance are. Now match the individual target groups with the predicted or existing resistance factors specific to them.

A simple spreadsheet will do it.

**(figure two)**

**The InfoMatrix**

This is a living document that exists throughout the life cycle of the project. It is constantly updated as new information comes forth indicating resistance issues that were not initially identified. As issues are addressed and eliminated, they are removed or shadowed to indicate successful and thoughtful attention to a problem that the targets had with the change.
Design and Implement the action steps to prevent or mitigate that resistance

**Communication**
This step is often misunderstood, though recognized as critical by change management practitioners. They know communication and learning are key to a successful change. But communicate what? Not what they or the project team or the senior leaders think should be communicated. Change management is “target-centric”. What that means is that the content of the communications must be what the targets need to know: the information that will help them to choose to change and to change with a minimum of effort. As that need is defined in the InfoMatrix, the connection between these two tools is vital. The communication content is built from the questions, concerns and issues taken from the InfoMatrix.

**Learning**
Change Management Practitioners DO recognize the value of training as an important asset in the change process. Note that we at LaMarsh Global use the term learning, not training for this critical element. The reason is that learning has two parts. The actual physical time spend in training (whether instructor-led or electronic) is only the first step. Practicing what has been learned and gaining ability and fluency over time is a key part of the learning process. So we need to plan and build in time for both and identify ways to monitor both.

**Reward/Reinforcement**
Now to the reward/reinforcement system too often ignored or not considered. We believe there are two elements here, two separate plans to be made and executed. The reward system plans for changes in the standard way of rewarding people. What changes in their reward system are needed (being paid, performance goals, job title, and job description)? If those elements of what rewards them for doing their job do not change when they now perform in a new way, they will not sustain the changes they have made.

The second element of this change management system is the reinforcement needed by the targets as they go through the delta, struggling with the new way, trying to effectively and efficiently apply what they learned in the training. This requires a plan to identify what to observe as progress and how (and who) to acknowledge their effort and their progress.

**STEP FOUR**

**Exit the engagement**

**Sustainment Plan | Exit Strategy**
When the project is completed, the desired state is achieved, there are two more critical activities the change management practitioner must accomplish before moving on to the next change.

**Sustainment Plan**
The desired state representation contains measures that needed to be realized for that desired state to become a reality. Now needs have been met. But they could slip. They could gradually return to the old ways because people remember being more comfortable, more efficient, more at ease doing things the old way. So before leaving, make sure whoever owns the ‘new current state’ is left with a monitoring plan to ensure there is no slippage and a reinstituting plan if there is.

**Exit Strategy**
Did the organization learn anything about change in this project? Did you? Did people build their skill as sponsors, targets, and change agents? If so, documenting and celebrating learnings are important parts of closing down the project. So is keeping a record of what was done: tools used, problems solved, lessons learned. These notes will help the next change management practitioner and help to build an organization that manages change well: the ultimate goal of effective change management.

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**The Change Agent’s Guide to Change Management**

Change management requires a disciplined process. The four action steps described here are the foundation of that process. No step can be skipped because one builds on the other. These steps are based on a fundamental premise. Making it easier for people to accept change means that we the change agents have to do the following:

- Figure out who is going to be impacted by the proposed change
- Identify what might cause them to resist the change
- Design ways to use communication and training and rewards to help them overcome their resistance
- Implement those identified activities that will address the targets’ needs

So simple a premise. So hard to execute. The four steps presented here make it much easier to execute: the Change Agents Guide to Change Management.
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