



Chief Strategy Officer

*Collaborative*SM

The Culture of Change:

Why Strategy and Change Management are Best
Friends



Chief Strategy Officer
*Collaborative*SM

Our Promise: Every session, you'll walk away with one thing you can use.

Always Thursdays

1st

Deep Dive - General Session

Masterclass + "From the Field" + Application

2nd
& 4th

Live Roundtable – CSO Pro

Ask Us Anything Q&A

Dive into your specific questions & share

3rd

Workshop a Topic – CSO Pro

Breakout groups by role and/or sector to share, problem solve with peers.

Today's expert on Change Management



Vernae Jones-Seals
CEO, Managing Principal



www.onesourcesbc.com
www.linkedin.com/in/vernaejonesseals

Vernae Jones-Seals founded OneSource in 2002. A trusted advisor with over 25 years of experience in business management and consulting, Ms. Jones-Seals strives to foster a positive professional work environment that encourages ongoing training and development; delivering services and solutions that exceeds her clients' expectations. Vernae believes the success of an organization is not by chance, but by innovative planning, thoughtful execution and on-going strategic financial and business management.

Certified Change Management Practitioner
Outsource Chief Strategy Officer
Organizational Transformation Consultant



What Is:

Change Management

The process, tools and techniques to manage the people side of change to achieve the required business results.

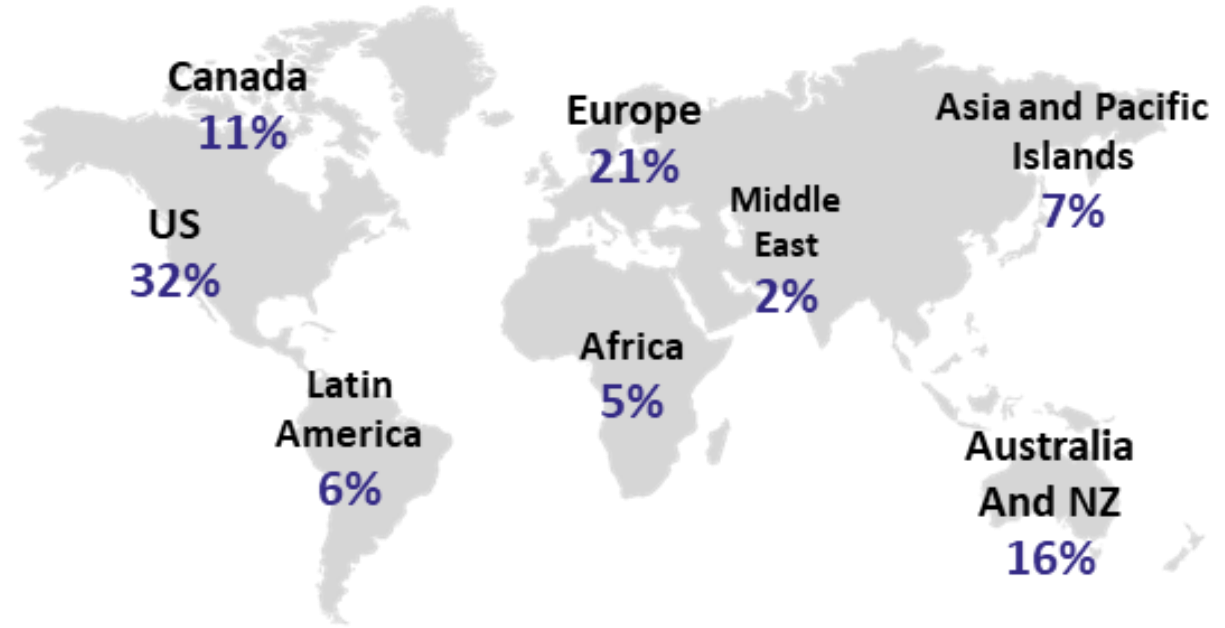


The People side of Change

Prosci, at Its Core, Is a Research Organization



Participants



Study input from leading organizations around the world:



The ADKAR Method

Prosci

A

Awareness – Of the need for change

D

Desire – To participate and support the change

K

Knowledge – On how to change

A

Ability – To implement desired skills & behaviors

R

Reinforcement – To sustain the change



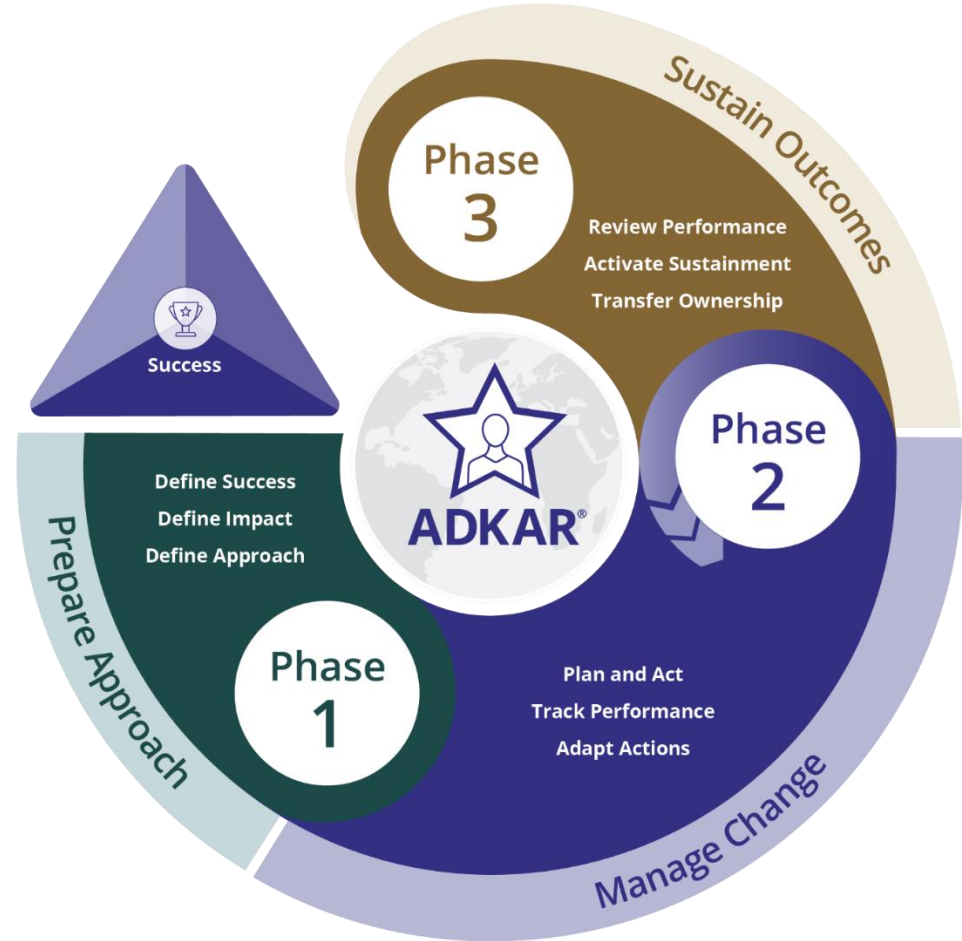
Three Major Misconceptions:

1. You can control the change without a well-thought-out change plan
2. Resistance is bad
3. No news is good news

The Integration of Strategy & Change Management



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CULTURE FOR CHANGE

The Integration of Strategy & Change Management

CULTURE FOR CHANGE

An integrated strategic planning and change management system allows for a tactical and people-centric approach to business transformations.

Key Drivers of Change Management

- Customers
- Internal Capabilities
- Competitors
- Technology

Key Drivers of Strategic Planning

- Tactical Approach
- Business Outcome Focused
- People-Assigned
- Alignment of Goals
- Transformation

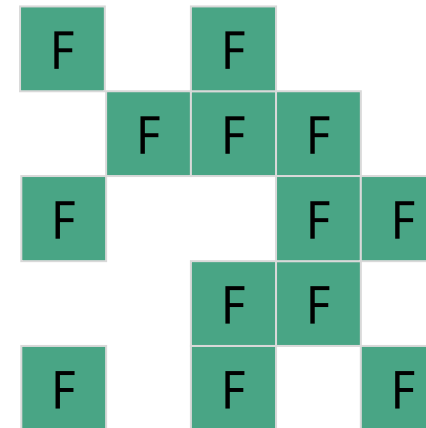
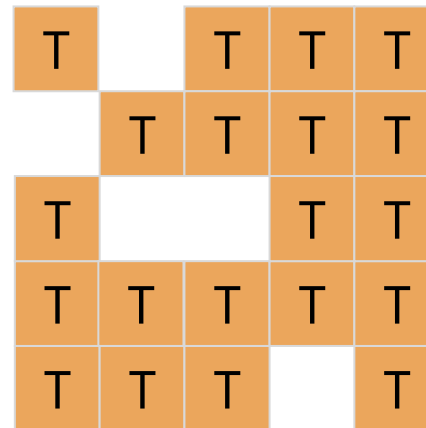
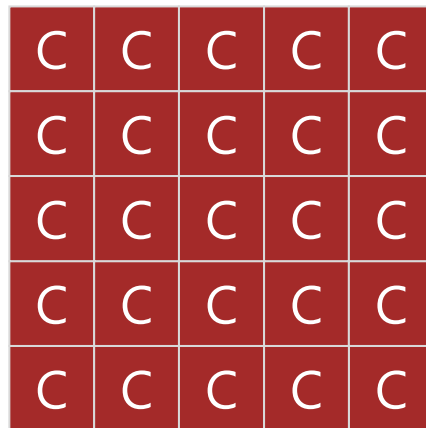
Three Major Obstacles:

1. Absence of executive support and active sponsorship
2. Lack of aligned, effective communication
3. Limited change buy-in which creates employee resistance

An Organizational Move to a Future State



Ultimately requires individuals to move from their current to their future state



Why Is the Integration of Strategy & Change Management Important?

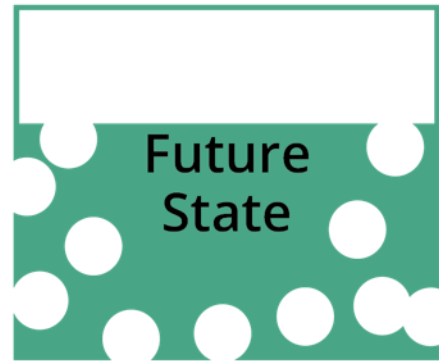
With Strategic Planning & Change Management



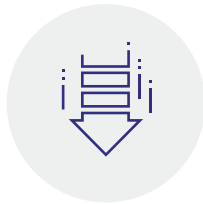
Without Strategic Planning & Change Management



Not Adopting a Culture of Change Outcomes



Instead of



Lower
ROI



History of Low
Adoption of
Changes





Not Achieving
or Sustaining
the Impact of
Desire



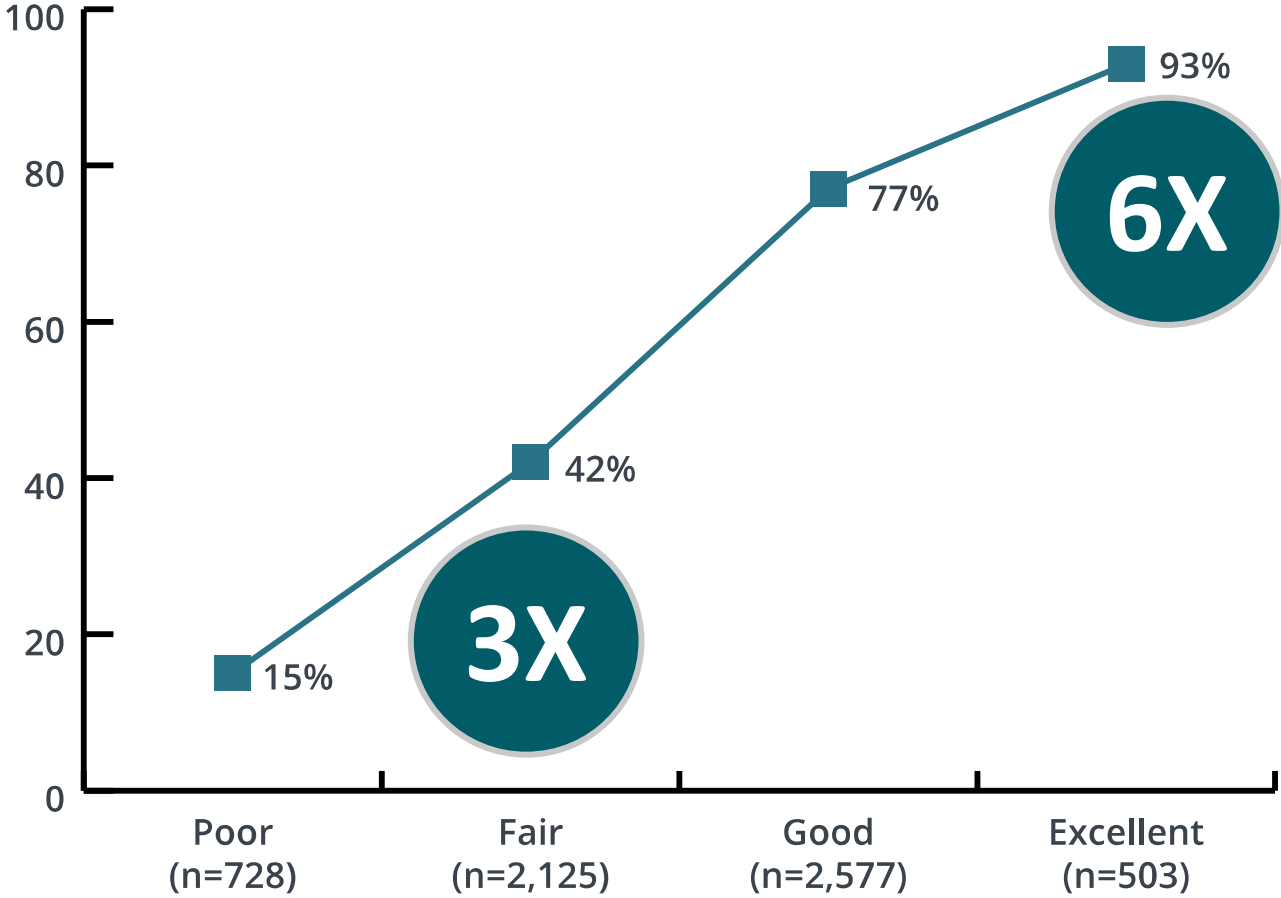
Not What We
Expected/
Hoped For

Results of Not Implementing Culture of Change

	 Costs:	 Risks:
<p>To the project if we do not manage the people side of change well</p>	<ul style="list-style-type: none"> • Project delays • Missed milestones • Budget overruns • Rework required • Loss of work by project team 	<ul style="list-style-type: none"> • Resistance – active and passive • Project put on hold • Resources not made available • Obstacles appear unexpectedly • Project fails to deliver results • Project is fully abandoned
<p>To the organization if we do not manage the people side of change well</p>	<ul style="list-style-type: none"> • Productivity plunges (deep and sustained) • Loss of valued employees • Reduced quality of work 	<ul style="list-style-type: none"> • Impact on customers • Impact on suppliers • Morale declines • Legacy of failed change • Stress, confusion, fatigue • Change saturation
<p>To the organization if this change does not deliver the results we expect</p>	<ul style="list-style-type: none"> • Lost investment in the project • Lost opportunity to have invested in other projects 	<ul style="list-style-type: none"> • Expenses not reduced • Efficiencies not gained • Revenue not increased • Market share not captured • Waste not reduced • Regulations not met

What Happens After Integrating Strategy & Change Management?

Percent of respondents that met or exceeded project objectives



Prosci 2020 Benchmarking Data from 2007, 2009, 2011, 2013, 2015, 2017, 2019



Rachel Woodhouse

Principal and Director of Operations

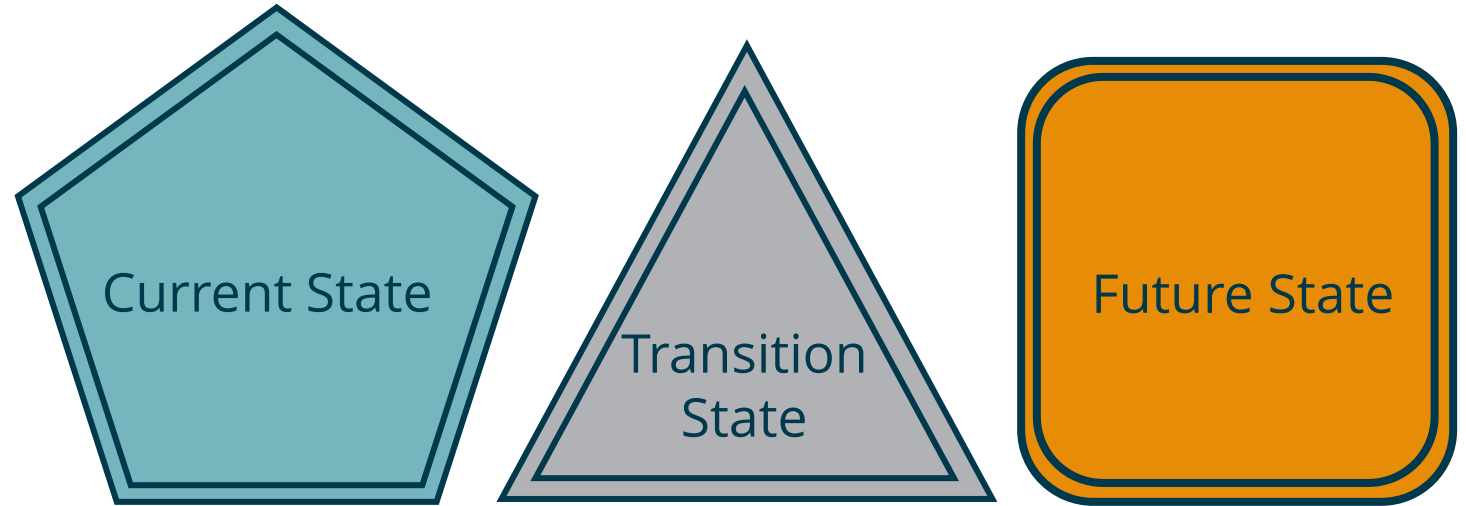
Dyer Brown is an Architecture and Design firm with 40+ architects, interior designers, graphic designers and strategists.

Established in Boston, Massachusetts in 1969, Dyer Brown has had over four generations of leadership.

Principal and Director of Operations, Rachel Woodhouse NCIDQ, LEED AP, joins us today to discuss their transformation.

DYER BROWN
& ASSOCIATES

Legacy Planning: Moving Through Generations of Leadership





Karl Hampe

Northeast Region Advisory
Market Leader

Danielle Hill

BRN Relationship Manager

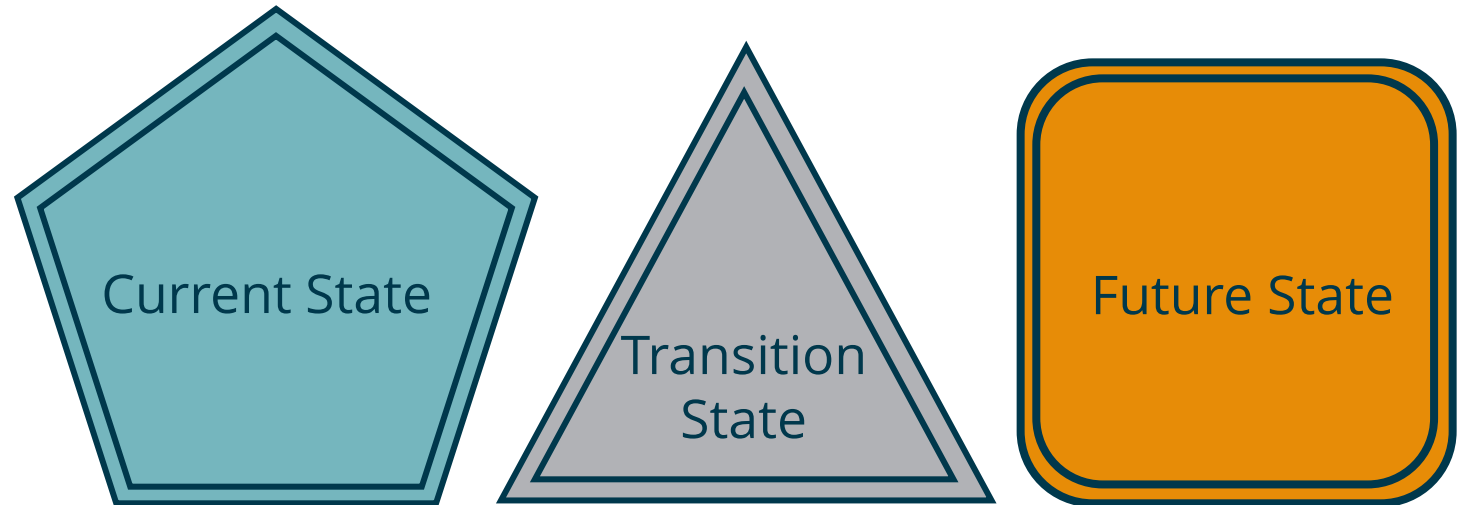
BDO professionals provide assurance, tax and advisory services for a diverse range of clients across the U.S., and in over 160 countries through our global organization. Founded in 1910, the firm has grown to more than 65 offices and more than 740 independent alliance firm locations nationwide.

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Karl Hampe and Danielle Hill join us today to discuss their transformation.



BDO Alliance DE&I Focus



KEY QUESTIONS FOR THE AGENTS OF CHANGE

- What was the **biggest challenge** when addressing and adopting a culture for change?
- From your experience, what is a key takeaway that you will always continue to do and that you want to tell everyone on this call to **start** doing?
“If there is one thing for you to start doing now - you should start doing this ...”
- What is a key learning that you would tell people to **stop** doing now?

Organizational Assessment

Success	Score: 1-3
1. Inputs into the change management process are defined (may include a business case, charter, scope, or plan).	
2. Organizational benefits are fully defined (what the organization gains).	
3. Project objectives are fully defined (what the project achieves).	
4. Adoption and usage objectives are fully defined.	
5. Units of measure for benefits and objectives are established.	
6. Benefits and objectives are prioritized.	
7. Benefit and objective ownership is designated.	
8. People dependency of benefits and objectives is evaluated.	
9. The definition of success is clear and ready to be communicated.	
10. The sponsorship coalition is aligned to a common definition of success.	

Leadership/Sponsorship	Score: 1-3
1. The change has a primary sponsor with the necessary authority over the people, processes and systems to authorize and fund the change.	
2. The primary sponsor can clearly explain the nature of the change, the reason for the change, and the benefits for the organization.	
3. The organization has a clearly defined vision and strategy.	
4. The change is aligned with the strategy and vision for the organization.	
5. Priorities are set and communicated regarding the change and other competing priorities.	
6. The primary sponsor is resolving issues and making decisions related to the project schedule, scope and resources.	
7. The primary sponsor is actively and visibly participating throughout the lifecycle of the change.	
8. The primary sponsor is encouraging senior leaders to participate in and support the change by building a sponsor coalition.	
9. The primary sponsor is building awareness of the need for the change directly with employees.	
10. The primary sponsor is visibly reinforcing the change by celebrating successes and addressing resistance.	

Organizational Assessment

Project Management	Score: 1-3
1. The nature of the change is clearly defined including who is impacted and how.	
2. The project has specific objectives.	
3. The project has a clearly defined scope.	
4. The project has a project manager assigned to manage the project lifecycle.	
5. Project milestones are identified and a project schedule is complete.	
6. A work breakdown structure with deliverables is complete.	
7. Resources for the project are identified and acquired.	
8. Periodic meetings are scheduled with the project team and key stakeholders to track progress and resolve issues.	
9. The project manager understands the value of change management in ensuring the change will be adopted and used.	
10. The Change Management Plan is integrated with the Project Management Plan.	

Change Management	Score: 1-3
1. The change is applying a structured change management approach to deliver the benefits to the organization.	
2. An assessment of the change and its impact on individuals and the organization is complete.	
3. An assessment of the change risk is complete.	
4. The change has specific adoption and usage objectives.	
5. An assessment of the strength of the sponsor coalition is complete.	
6. A customized and scaled change management strategy with the necessary sponsorship commitment is complete.	
7. The resources required to execute the change strategy and plans are identified, acquired and prepared.	
8. Change management plans that will mitigate resistance and achieve adoption and usage are complete and are being implemented.	
9. The effectiveness of change management is being monitored and adaptive actions are being taken if required to achieve adoption and usage.	
10. The organization is prepared to own and sustain the change.	



Communications Checklist for Change Management

- Use preferred senders to deliver communications in your organization**
Employees prefer to hear messages from senior leaders for organizational messages about change (i.e., business reasons) and from people managers for the personal impacts.
- Prepare and equip preferred senders to effectively deliver communications**
In addition to coaching preferred senders to communicate messages effectively, you need to facilitate communications by drafting messages, ensuring consistency among senders, and sequencing and scheduling delivery.
- Ensure that preferred senders answer the right questions first**
When people learn about a change, their first question is, “Why is this happening?”
The first communications about a change should always focus on:
1) why the change is happening, 2) why it’s happening now, and 3) the risk of not changing.
- Next, answer the WIIFM question**
WIIFM stands for “What’s in it for me?” It’s a question people always ask during change, even when the change seems positive. Because making a change is a personal choice, communication only resonate with the impacted individuals if you address what they care about.
- Preferred senders should repeat key messages five to seven times**
Having the preferred senders repeat key messages ensures that the messages you want to communicate get heard by your audience as you intended.
- Resist the urge to communicate exclusively through the project team**
Remember that people have preferred senders of messages. One of the biggest and most common mistakes you can make is to have your project team send all the communications.
- Find effective ways to reach your audience**
An effective communications plan uses numerous channels such as virtual or in-person meetings, small group forums, one-on-one conversations, newsletters, presentations, brainstorming workshops, focus groups, lunch and learns, intranet Q&A forums, screen-saver messages, etc.
- Emphasize face-to-face communications**
While it is time intensive to meet with someone live—either in person or virtually—the effort delivers far more value than an email message.
- Create opportunities for two-way communications**
Two-way communications lead to greater support for change, so your communications plan needs to include them. For example, create small-group forums where participants share concerns and feedback, and can ask questions of senior leaders in real time.
- Evaluate the effectiveness of your communication messages**
To understand if your audience is hearing and properly interpreting the messages you send, use a combination of post-communication surveys, focus groups, and individual interviews to assess effectiveness, and then take adaptive actions if necessary.

Q1 Calendar

Always

Thursdays

2nd @ 8am PT

4th @ 8am PT (Jan)

4th @ 10am PT (Feb+)

Ask Me Anything

Pro Only

Can You Say What Your Strategy Is?

Topic Deep Dive - General

1st Thursday @ 8 a.m. PT

January 5, 2023

Workshop by Sector – Pro Only

3rd Thursday @ 8 a.m. PT

January 19, 2023

Culture of Change

Topic Deep Dive - General

1st Thursday @ 8 a.m. PT

February 2, 2023

Workshop by Role – Pro Only

3rd Thursday @ 10 a.m. PT

February 16, 2023

Running a Killer Quarterly Refresh

Topic Deep Dive - General

1st Thursday @ 8 a.m. PT

March 2, 2023

Workshop by Sector – Pro Only

3rd Thursday @ 10 a.m. PT

March 16, 2023

Want more?

PS – We're running a
23% discount for 2023



We have 62 seats left at
this price 😊



Chief Strategy Officer *Pro*SM

Join the community of practice every week to...

...gut-check a new idea.

...drill down on topics impacting your organization *right now*.

...receive outside perspective on a problem you're too close to.

...get advice on a question you're expected to have an answer for!

...collaborate with other leaders of strategy.

What you get:

CSO Master class Session

60-minutes of action on a
topic every month.
1st Thursday.

2 Monthly Ask Us Anything Sessions

Get answers to your
toughest question.
2nd and 4th Thursdays.

Monthly Workshop + Peer Share

Workshop topics and
challenges you face.
3rd Thursdays

Our Ask

**If you got something out of today...
...invite at least 1 person to join.**

Share <https://onstrategyhq.com/cso-collaborative/>

and

Forward the post-session summary email, probably coming out tomorrow.

CSO Collaborative

Final thoughts



Expect today's content in your inbox

We'll email by tomorrow with links to resources we talked about.



Suggestion for topics? Feedback?

Drop us a line anytime – let us know what you think and what you'd like to tackle as a group.

collaborative@onstrategyhq.com

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