Chief Strategy Officer
Collaborative[SM]

Change Management
and it's impact on Strategy

Today's expert on Change Management

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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.

An **integrated** strategic planning and change management system allows for a **tactical and people-centric approach** to business transformations.
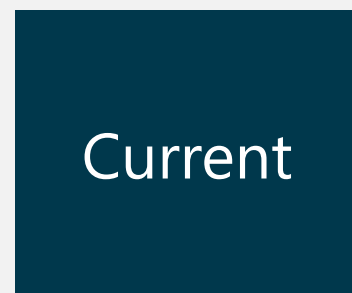
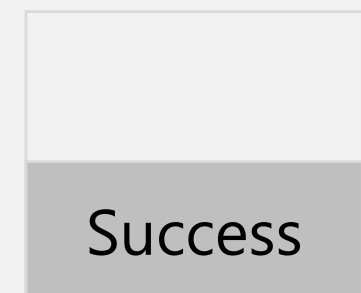With Strategic Planning & Change Management

| Current | Transition | Future | = | Success |

Without Strategic Planning & Change Management

| Current | Transition | Future | < | Success |

What does it mean to be *READY* for Change Management?

| **Prepare Approach** | Manage Change | Sustain Outcomes |

Define Success

- What are we trying to accomplish?
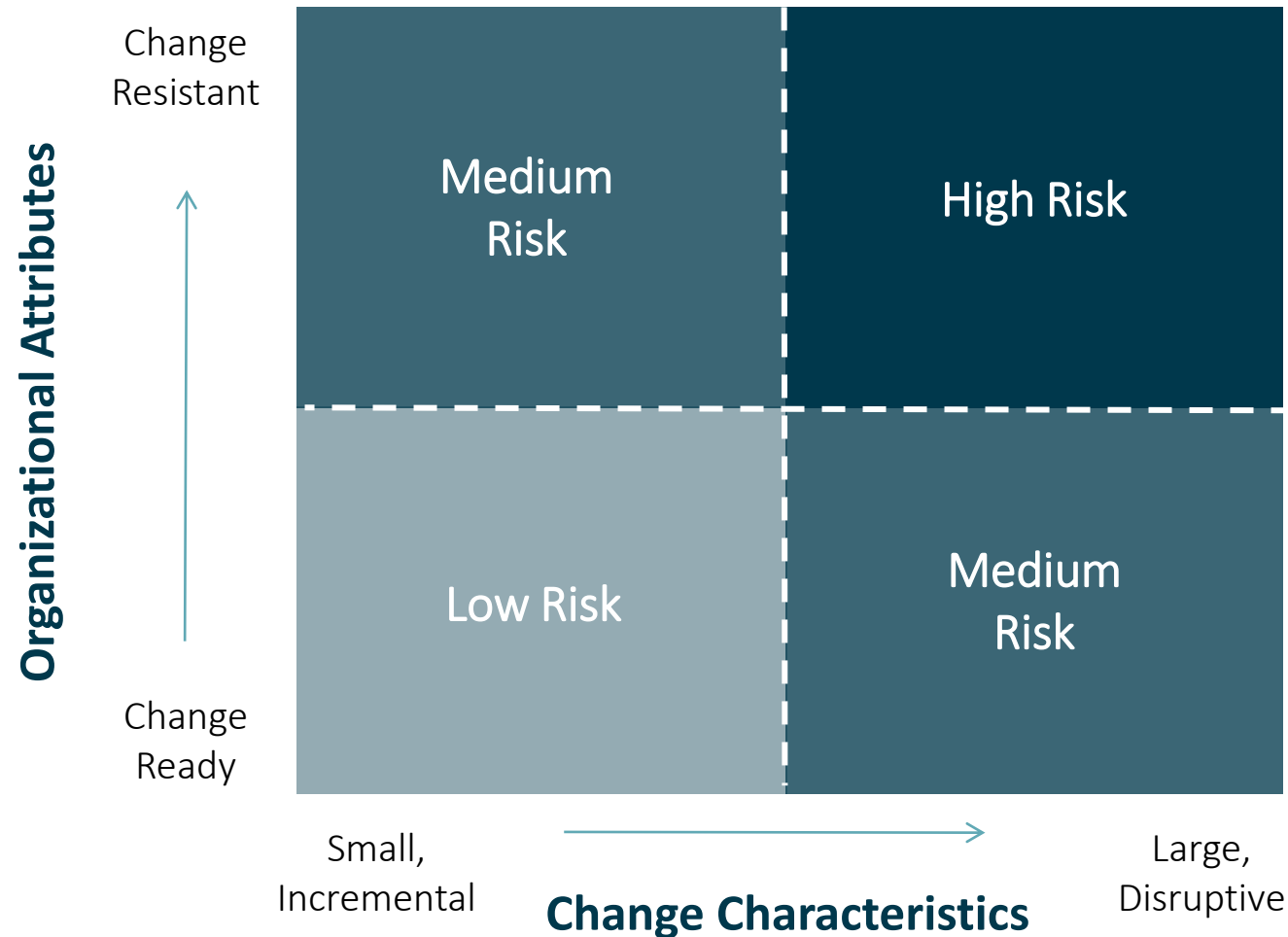- What does success look like?

Define Impact

Who must do their jobs differently because of this change?

Define Approach

What will it take to achieve success?

Risk Assessment
for Change Management

An effective change management approach is **customized and scaled** based on **risk.**

Organizational Assessment
for Change Management

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
for Change Management

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, communica 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 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.

Rolling Calendar

Always Thursdays

Chief Strategy Officer
Collaborative^{SM}

Workshop & Peer Review – Culture of Change [Pro Only]

Feb 16 @ **10 a.m. PT**

"Ask Us Anything" Live Roundtable [Pro Only]

Feb 23 @ **10 a.m. PT**

"Ask Us Anything" Live Roundtable [Pro Only]

March 9 @ **8 a.m. PT**

🎯 **Master class: Running a Killer Quarterly Refresh**

Chief Strategy Officer General Session

March 2 @ **8 a.m. PT**

Feedback? Questions? Ideas?

Contact
collaborative@onstrategyhq.com

Specific Session Topics
https://onstrategyhq.com/ama-contact