



AGILE CHANGE
management limited

Success criteria for change initiatives

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Introduction

This document summarises some of the latest thinking on what is needed for successful transformational change. The contributions are from:

McKinsey: Helping employees embrace change	http://www.mckinsey.com/insights/organization/helping_employees_embrace_change
IBM: Making Change Work Report	http://www-935.ibm.com/services/us/gbs/bus/pdf/qbe03100-usen-03-making-change-work.pdf
PMI: Enabling Organisational Change Report	http://www.pmi.org/~media/PDF/Publications/Enabling-Change-Through-Strategic-Initiatives.ashx
Boston Consulting Group: The Hard Side of Change Management	https://hbr.org/2005/10/the-hard-side-of-change-management
Accenture Change Tracking Service	http://www.accenture.com/us-en/Pages/service-accenture-change-tracking-overview.aspx
KPMG: The Change Challenge; Realising the Full Potential of Your Business Initiatives	http://www.kpmg.com/US/en/services/Advisory/management-consulting/management-consulting-by-capability/Documents/kpmg-the-change-challenge.pdf

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<p>Senior Managers <u>Commitment</u> – put initiative at top of agenda</p> <p><u>Communication</u> – relate single, clear, compelling story – no mixed messages</p> <p><u>Financial incentives</u> – reward senior managers if initiative is successful</p> <p><u>Non-financial incentives</u> – provide recognition for strong performance</p> <p><u>Leadership</u> – identify owner/champion</p> <p><u>Stretch targets</u> – uphold goals with mantra-like consistency; team 'lives or dies' by the numbers</p>	<p>Real Insights, Real Actions</p> <ul style="list-style-type: none"> - Strive for a full, realistic awareness and understanding of the upcoming challenges and complexities, then follow with actions to address them. 	<p>Having well-defined milestones and metrics</p>	<p>Duration: 'a long project that is reviewed frequently is more likely to succeed than a short project that isn't reviewed frequently';</p>	<p>Turbulence (conditions such as the magnitude, pace and risks of change):</p> <ul style="list-style-type: none"> o risks and roadblocks; o changes taking place; 	<p>Share the vision - Develop an overarching, strategic vision for your initiative that defines the desired future state in a compelling manner. Clearly outline the expected benefits, cultural changes and behavioural attributes while consistently reinforcing this vision to motivate and inspire employees.</p>
<p>Middle Managers <u>Decision authority</u> – exercise consistent control over a defined set of tasks</p> <p><u>Skills in managing people</u> – provide feedback to employees on status of initiative</p> <p><u>Skills in managing projects</u> – achieve measurable milestones in a timely manner</p>	<p>Solid Methods, Solid Benefits</p> <p>Use a systematic approach to change that is focused on outcomes and closely aligned with formal project management methodology.</p>	<p>Having senior management committed to change</p>	<p>Integrity: 'the extent to which companies can rely on teams of managers, supervisors and staff to execute change projects successfully'. This comprises the mix of knowledge, skills and experience needed in getting changes done on time, to budget and the required quality;</p>	<p>Resources:</p> <ul style="list-style-type: none"> o training and capability; o systems and processes; o project support; 	<p>Understand the change - Assess the complete impact of the change, it's magnitude, perception and associated risks. Base your change strategy and support needs on specific gaps and opportunities.</p>

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<p>Front Line Staff</p> <p><u>Skills</u> – consider training key aspect of initiative</p> <p><u>Tools</u> – make technology and techniques available to employees</p> <p><u>Motivation</u> – clearly reward excellent performance to improve morale</p>	<p>Better Skills, Better Change</p> <p>Leverage resources appropriately to demonstrate top management sponsorship, assign dedicated change managers and empower employees to enact change.</p>	<p>Establishing and communicating concrete ownership and accountability</p>	<p>Commitment: the demonstrable willingness of top management, the change team and the recipients of change to be engaged in the change;</p>	<p>Aligned direction:</p> <ul style="list-style-type: none"> - Vision and direction; - Communication; 	<p>Prioritise your efforts - Allocate resources in a manner that allows you to address key issues first. Prioritising efforts can accelerate progress and enable 'quick wins' that help encourage stakeholder buy-in and support.</p>
	<p>Right Investment, Right Impact</p> <p>Allocate the right amount for change management by understanding which types of investments can offer the best returns, in terms of greater project success.</p>	<p>Using standardized project management practices</p>	<p>Effort: the effort that is required 'over and above the usual work that the change initiative demands of people'.</p>	<p>Engagement:</p> <ul style="list-style-type: none"> - Change leadership (the level of commitment and support provided by leaders); - Involvement (the level to which people are involved in planning and implementing change); 	<p>Create leadership engagement - Leaders need to 'own' the change by clearly positioning themselves as strong advocates for the change and consistently supporting the future vision and it's benefits.</p>
			<p>Effort includes sponsors and senior management who may have multiple time pressures and the next change initiative to concern them;</p>	<p>Team leadership:</p> <ul style="list-style-type: none"> - Management skills; - Feeling valued; - Accountability (clear performance objectives and people held accountable for achieving outcomes); 	<p>Consider all stakeholders - Changes affect both internal and external parties so consider the greater universe of stakeholders such as suppliers, customers, outside investors and shareholders. Address their particular needs in your change efforts even if the impact is minor.</p>

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			Effort includes the change team itself, who may be focusing purely on the project implementation date rather than the 'aftershock' of the change;	Emotional energy: - passion and drive (positive feelings); - disturbance (negative feelings such as fears and frustration).	Continuously communicate - Regular, proactive, meaningful and transparent communication is essential at every stage of the initiative. In fact, when nothing is communicated, inaccurate or unwanted messages develop. This applies to employee messaging and discussions with the Board, investors, analysts and customers.
			Effort includes line managers, who often have the job of juggling 'business as usual' as well as implementing the change in their areas and managing staff through the transition;		Develop sustainable training programmes - Develop relevant, targeted training programmes that are tailored to the specific needs of your audiences. Don't forget that training may need to evolve and ensure that processes and ownership for updating your training content and retraining your staff are clearly defined.
			Effort includes employees involved in implementing change, who may need additional resources to do this, e.g. a reduction in normal workload, backfilling or recognition that there will be a performance dip		Realign the organisation - Technology, process and policy changes have frequent implications for the structure of the organisation. Realigning the organisation and changing roles and responsibilities may be required to adjust to new ways of working.

Melanie Franklin has a track record of excellence in project, programme and portfolio planning and delivery. In recent years she has focused on helping organisations move from waterfall to agile project management approaches in response to the increasing need to deliver projects on a shorter timescale.

Creating agile environments has grown in importance in recent years, and many executives are driving this adoption as they become aware of the benefits of agile thinking in responding to fast moving changes in the international business environment.

She is a respected author of 8 text books about project and change management. Her most recent book, 'Agile Change Management' proposed an approach to managing change initiatives that applies the principles of agile project management. This ensures that the exact deliverables from a change initiative can evolve in response to customer, regulator and market demand, project deadlines are still respected.

Melanie believes in authentic leadership, therefore, as well as using her training skills to develop the skills and knowledge of attendees on her courses, she also ensures she attends training to build her own skill set. Melanie is an accredited trainer in AgilePM and is a Certified Scrum Master and LeanKanban Practitioner. She is also an accredited trainer in Change Management, an examiner for the APMG Change Management Foundation and Practitioner qualifications and the Co-Chair of the Change Management Institute UK.

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