

Change Management

A Professional Advantage guide to doing better business.



 professional
advantage

Real Difference, Real Value, Every Day



“Turning your world upside down”

Change Management – a Professional Advantage guide to doing better business

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Introduction

“Bury me on my face” said Diogenes. When asked why he replied, “Because in a little while everything will be turned upside down.”
– Diogenes, Greek Philosopher

Common sense suggests that business systems should be designed and implemented to best meet the business needs and objectives. Sometimes these needs are very specific control and process issues. Others can be forced on an organisation through a change in the business environment – such compelling events as direct taxation and corporate governance legislation spring to mind. Most frequently they are driven by customer demand, corporate strategy and the search for competitive advantage.

Whatever the drivers and scope, best practice requires that the proposed change is quantified and planned from the outset and the progress and desired outcomes are measured to ensure maximum success.

Frequently the change to the business can be more comprehensive than initially considered; its impact is always more extensive than the immediate influence of the newly implemented system. It includes the more obvious areas for consideration such as staffing, skill sets, operating environments, etc and can have a broader, possibly unexpected impact on areas such as share holder value, customer retention and supplier performance.

Most challenging for many is managing the real and perceived upheaval that people naturally feel threatened by during the period of change and realigning those people’s interests with that of the overall change objectives and company goals.

This document is a summary of the lessons and experiences that Professional Advantage has gleaned over the last twelve or more years of system implementation. These lessons have come from a broad range of resources including business and technical consultants, project managers, business development managers, sales partners, value added resellers and thought leaders during our engagement with a wide cross-section of companies and industries. It is not intended to be an academic thesis or a “how to” manual, more a thought provoking discussion paper for people considering or commencing a business-process focused system implementation.

Many of the points we cover may seem blindingly obvious however, when they are all laid out in print and applied to the here-and-now, time and again we find that many issues have not been truly considered and no meaningful framework has been defined for a project.



First Principles

Change management is the method by which a company can successfully and effectively achieve a new goal. It is bounded by the following first principles:

- The design and communication of the overall goals and vision and what they mean (in plain language)
- The assessment, introduction and improvement of the relevant business processes
- The implementation of new, and/or alteration of existing, company infrastructure and culture
- The remodelling of existing, and/or addition of new, roles and responsibilities within the workforce
- The structured, progressive review of each of the above elements in light of the changes that have gone before (change begets change)

The common thread throughout these fundamental elements may be surprising to you – it is primarily about human resources management. The greatest success will only be achieved by communication, education and encouragement of the workforce by senior management and their agents of change.



Senior Management Buy-in

"Managers play a pivotal role in the success or failure of any organisation change or improvement effort. Their behaviour is the single most important variable in the process."
– Jim Clemmer.

Successful Projects have Brave, Insightful Managers

The more brave and insightful the senior management is in identifying and driving towards quantified business benefits, the more successful the final project outcomes will be.

Professional Advantage encounters compromise often. Critical Success Factors that were given as the basis and justification for a project are watered down or moved to some undetermined point in the future. Senior management signs the Project Terms of Reference and are never seen again.

We often hear a client project manager say they are the sponsor and key implementer – but we know there is a wider audience watching from the sidelines and that frequently some invisible entity has approved the expenditure but remains divorced from the project.

If you delegate ownership of the project vision and goals then you will not achieve the most significant benefits – you may spend a lot of money achieving very little. Senior management must apply the vision, focus and decisiveness needed to drive a project down the “path of beneficial delivery” rather than the “path of least resistance” or the “path of political pacification”.

The ongoing role of Senior Management is to further develop, communicate and achieve the vision following the period of change, not just during the change itself. Change is not a goal in itself; it is a milestone on the journey.

Appendix E is a suggested definition and responsibility summary for the selection of an effective Project Sponsor from within the senior management ranks.



The System is not the Solution

How will you know what to look for in a candidate system if you don't fundamentally know what you want to achieve from the business now and in the future?

Implementing a system is not the solution. All a system can do is deliver levels of consistency and control to the business processes that it enforces. If the business processes are fundamentally wrong or inefficient then the implementation of a system that follows those processes will deliver an equally, if not more, unsatisfactory outcome.

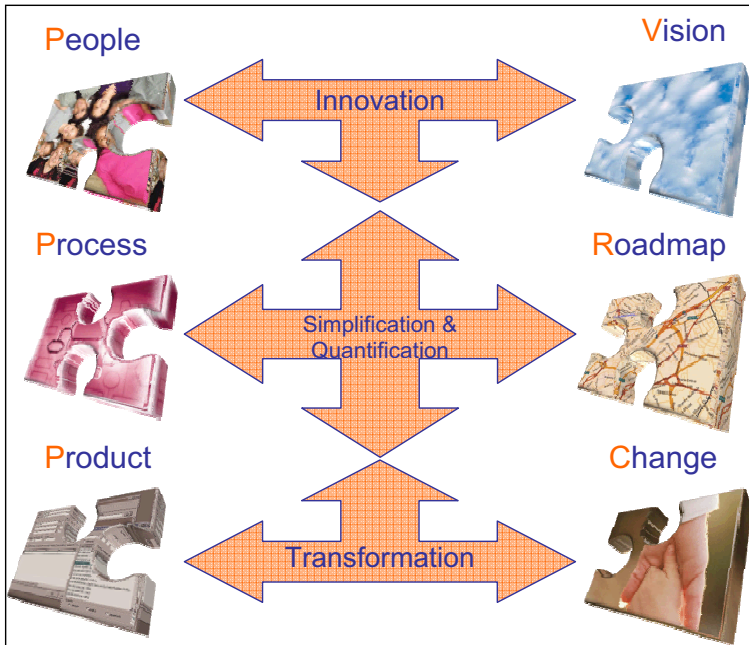


Diagram by e-Cocoon

In assessing how the adoption of a system will assist the company, the first place to look is at the value proposition for the change and then at the processes that it will follow and enforce. Significant attention should be paid to clarifying, standardising and simplifying the processes themselves. Rationalise how they will help the business make more money and be competitive long before any system selection commences.

The most successful projects in our experience are those where the vision and business objectives are clearly communicated and known by those involved in realising the project, your Project Team. Often we are asked to demonstrate the product before decisions can be made about the business process. This does help with understanding terminology and familiarisation but it should not be the basis for deciding 'where the company should go'. Experienced business solution partners and best practice adherence can help but we also need to know what the guiding success factors are.



What to Focus on at the Start

Your initial project effort will be best focused on defining:

- the value proposition
- the proposed benefits
- the basis for measuring success

Determine the roles, responsibilities and infrastructure necessary to make it happen and the outcome will be a draft roadmap for a truly beneficial project.

All too often Professional Advantage sees this journey start, if at all, after the investment has been made, during an implementation project.

Business should be in the Front Seat

“It must be considered that there is nothing more difficult to carry out nor more doubtful of success nor more dangerous to handle than to initiate a new order of things.”

- Machiavelli, Italian statesman and philosopher

The more the project responsibilities are delegated by the business to IT or Finance the less likely the business is to get what it was looking for. The resulting failure will be the fault of the business – not the delivery team.

Why should a Finance Manager – clamouring for business involvement but gaining no input at project inception, no design workshop attendance, no business process acceptance testing – be told by the business that the project has not met its needs? Professional Advantage has on occasion resorted to building a prototype and demonstrated it again and again to business users before getting good attention and involvement. This approach may get the desired result but it is costly, with redesign and project timelines frequently impacted.

Identify the Value Proposition and Quantify the Benefits

- What is the measure by which the change should be assessed?
- Is there a quantifiable value proposition?
- Are the measures for project success SMART, i.e. specific, measurable, achievable, realistic, and time bound?

If you can't answer these questions then you probably shouldn't be starting a project. Identify the value, pursue it aggressively and deliver within the project.

Professional Advantage starts an implementation with an Executive Review – we need to know what the business wants to achieve and how it will measure success, both short and long term. Frequently quantifiable targets have not been identified by the business and if they are they are rarely returned to. Every major project ideally has;

- project based Key Performance Indicators (KPIs)
“we will reach these milestones in this timeframe”
- change management KPIs
“we will re-engineer, communicate and educate in these areas and ways”



- process based KPIs
“we will increase/decrease such-and-such from x to y”;

and measurement strategies that enables them to be reported against.

Throughout a project we will ask:

- Are the KPIs still relevant?
- Are they being met?
- Is the project on track?
- Is the change management on track?

We are not often asked the same by company management! After the project completes we may not be around to ask.

Give the Project a Name

A transformation project deserves some respect considering the potential impact on the business. It is difficult to respect something without a name. Put some effort into selecting a name with relevance that perhaps encapsulates the overall vision of the project in some way – but keep it short and punchy – eg. “Project Perseus– the pursuit of paperless procurement” (Perseus is the Roman mythological hero who killed Medusa, the monster with a head of snakes instead of hair). Never name a project after the computer system that is likely to be implemented as part of the solution (for a start the project should have commenced long before a system was selected). It is human nature to blame the “system” when you hit a problem and frequently it will be nothing to do with the underlying application. The actual cause of the issue will generally lie in human error, poor education, inaccurate data or a fractured business process. People need to be educated and encouraged to view issues as something to be resolved within the big picture of the transformation project. Let forensic analysis identify what the true root cause of a symptom really is. Troubles and conflict should be linked to the project, not the solution. Always clearly identify them separately.

The Project is not the End

“Nothing in progression can rest on its original plan. We may as well think of rocking a grown man in the cradle of an infant.”

– Edmund Burke, Irish politician and writer

A system is implemented in a relatively short period of time – benefits can take longer to achieve than the date for a project closure meeting. Return to the business case. Account for the change.



Change is like an Iceberg

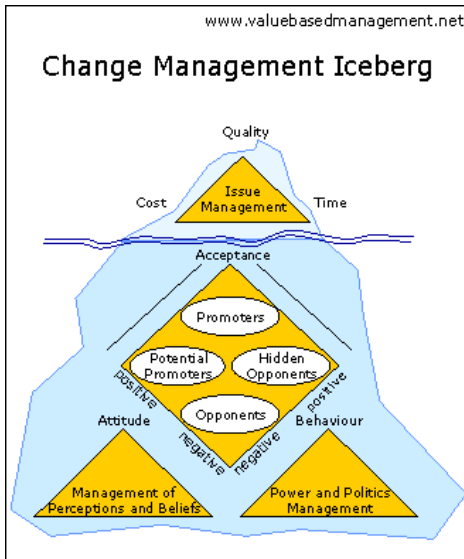


Diagram by Value Based Management

The effect of a change management project on an enterprise is like an iceberg in the sea – you can only see about 10% of the full mass. Understating the size and complexity of a change project can be extremely detrimental to its success. Look long and hard at the business end-to-end to identify all areas and stakeholders that will be impacted. Take them all into account in your planning and communication.

Remember, if you only see 10% then how much does your business solution partner typically see? Considerable effort has to occur before implementation begins to ensure all relevant and significant details are known.

Learn to Crawl First

“Be not afraid of going slowly; be only afraid of standing still.

– Chinese proverb.

Rollout of an extensive business system across the enterprise in one fell swoop is a difficult and challenging task. Spreading your project team and training resources too thin will guarantee a limited or modest initial success – people need to have the time to plan – to learn – to test – to recover from setbacks – to do the job properly.

“If quality is an option everything else is possible”

– Gerald Weinberg, American author.

Don't set yourself up for failure. Start in a friendly geography with a contained environment and an enthusiastic team. Go big from there.



Make Processes Easier

A fundamental approach to improving a system is to make the processes easier. This sits well with the concepts of effectiveness (doing the correct things) and efficiency (doing things correctly). Improve a system by making processes easier and outcomes better.

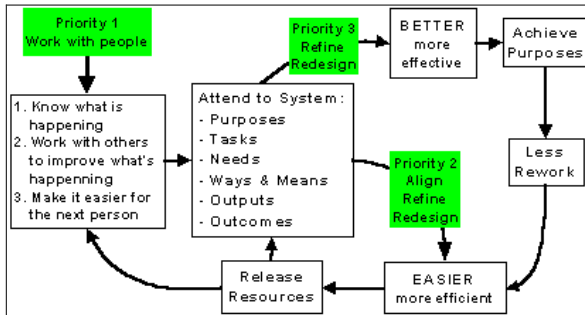


Diagram by Ivan Webb

Existing People, Roles and Processes may no longer be Relevant

When commencing a business process analysis you don't know what you are going to find out about your business but it is fair to say that there will be redundant people, job roles and business processes following the transformation project. You will need to acknowledge that fact and welcome it – that is where the gains for the company are going to be found.

Recognise this up front. Training people who don't invest this intelligence back into the business is a waste.

Generally Professional Advantage customers have invested in sizable studies to understand their current processes. They may have based these on current management understanding of those processes and on workflow in a current application. What was missed on occasions was the varied workarounds that sat in staff drawers and spreadsheets that supplemented the system's weaknesses. These were invariably identified during the project design process and either normalised or retired, however it led to delay as the client regrouped and assessed the extra information for consistency with the original business case.

The Change Program starts Now

Don't wait for the system rollout. Change management starts first – through goal setting, communication, culture, planning and strategising. The following outline is a schematic of a possible approach to structured change management. It proposes the four steps of study, action, plan and implement with the expectation of performing iterations of the cycle on an ongoing basis.

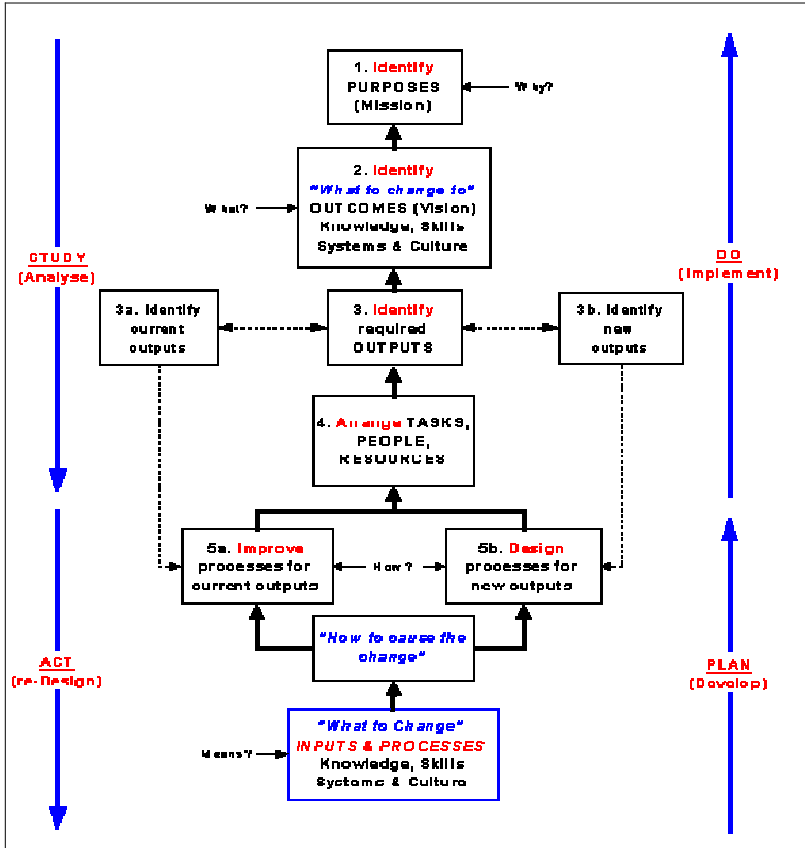


Diagram by Ivan Webb

If you are not ready for it, don't bother doing it.

Not much more to be said on that point.



Preparing for Change

“Change can't be managed. Change can be ignored, resisted, responded to, capitalized upon, and created. But it can't be managed and made to march to some orderly step-by-step process. However, whether change is a threat or an opportunity depends on how prepared we are. Whether we become change victims or victors depends on our readiness for change.”
– Jim Clemmer

Generating a Culture of Change

The more inclusive the project is, the more likely that people issues will not be so challenging. People are willing and able to change voluntarily when they can see and understand the benefits to them (very few of us were forced to use mobile phones, PDAs, personal music players, the Internet, canvas shopping bags).

Make the KPIs fit the New World

Look carefully at the workforce key performance indicators (KPIs) of the business that are used to measure, motivate and remunerate. If you change the business processes you may end up with critical KPIs no longer reflecting what you want to achieve.

Remember to consider the KPIs in light of where they will be applied – Professional Advantage worked recently on a procurement project where a common KPI was used for both capital city and regional town area manager performance. Unfortunately in this case the regional manager could rarely achieve more than 3% of bonus whilst the capital city manager always received 90%+. The KPIs were volume targets that were patently unachievable for the regional areas.

Furthermore if people are measured and remunerated against old KPIs you will be creating resistance to change. Modify the KPIs to reflect the processes that deliver the quantifiable benefits and watch the resistance fade away.

Increased Profitability makes your Jobs more Secure!

Help your staff understand the value to them. Find a way of relating the value proposition for the change to personal benefits in a way that truly relates to them – job security through increased competitiveness and profitability might sound like a good place to start however it is invariable treated with varying levels of scepticism.

User Acceptance Testing

“The test of a vocation is the love of the drudgery it involves.”
– Logan Pearsall Smith – American writer.

Clearly assess your readiness for user acceptance testing and design your own UAT plan. Don't ask the business solution partner to provide or design a UAT schedule for you – they are the people that have put the system together – they are likely (through no deliberate act) to provide you with a plan that will be successful. It is your responsibility to go out of your way to bullet-proof the system by ensuring it is fully tested for the business. When you find problems don't be surprised and don't be upset. Assess the problem against the needs and objectives of the business and address it accordingly.

Have a separate set of appropriately configured hardware for user acceptance testing prior to implementation and for ongoing upgrade testing. This is just common sense – don't risk the stability of the business by testing a new version on the production infrastructure.



Checklists

Develop task and responsibility checklists for the relevant stakeholders in the project. When you select the senior Project Sponsor ensure that they understand what is expected of them and what level of involvement they will have in all areas of the project. Similarly with the Project Manager. Clearly define the accountability as opposed to the responsibility in the Project Sponsor and Project Manager checklists. This is an area where lack of attention to detail can cause misunderstandings over what each player's roles actually entail.



Managing the change

Project Sponsors and Project Managers

Clearly define and articulate the roles and responsibilities of the Project Sponsors and Managers

Project Sponsors define the direction and benefits and what you are going to achieve.

Project Managers are responsible for delivering the outcome on time and in budget.

The Project Sponsor is not a hands-off role. It can not be delegated nor returned to as a post implementation checkpoint. The Project Sponsor should be defining, communicating and pursuing the benefits of the project and closely monitoring progress on an ongoing basis. Is the value proposition still relevant? Are all areas of the responsibility matrix identified and assigned for each stage of the project? Responsibilities cannot overlap – “one tick in each box” and “a tick in every box”. Refer to Appendix E for a suggested responsibility summary of the Project Sponsor.

Sanity Checks

Take sanity checks throughout the project. Are you focusing on the right benefits? Are you going to achieve them? Is something going off the rails and what needs to be done to pull it back on track? Take these sanity checks from as objective a point as possible and move swiftly to redress any problems.

Motivating the Change Management Team

“The real problem is what to do with problem solvers after the problem is solved.”

- Gay Talese, American (Italian-born) journalist

Depending on the levels of negativity entrenched in the culture of your organisation the change management team is likely to experience some unpleasant incidents before long. They may be embroiled in politics, blocked by objectors, threatened by empire builders, have their authority challenged, their work demeaned, their enthusiasm mocked and their self esteem brutalised. A tough environment for anyone, an impossible challenge for an unmotivated team.

“Illegitimus non carborundum”

translates to:

“Don’t let the bastards grind you down.”

- U.S. General Joseph W. “Vinegar Joe” Stilwell

It’s at these times that the bravery and commitment of the senior management project sponsor will be tested and proven. The change evangelists will need clear and unfaltering public support in their efforts. They will need buoying when they fail, praise when they overcome and wild celebration when they succeed.

Allow for the “Fast Failure”

“If at first the idea is not absurd then there is no hope for it.”

– Albert Einstein.

Some of the biggest wins and largest leaps can come from wild, left-field ideas; and from the most unlikely quarters. Some of the biggest failures will also come from the same risky place.



Where possible, Professional Advantage uses a 'Proof of Concept' to help organisations prototype an idea without the risk of proceeding full scale. This allows you to translate ideas into operational visions. A worthwhile investment if there are potential big gains; but don't be disappointed in failure. Better then than after deployment.

Be willing to try out the wild and the wonderful and be agile enough to identify when it is failing and swiftly adjust the project accordingly.

Create a Feedback Loop

A feedback loop is simply a method by which people affected by the change can register their thoughts and experiences in some way and raise pointers to how things could be done better – faster – smarter in the future.

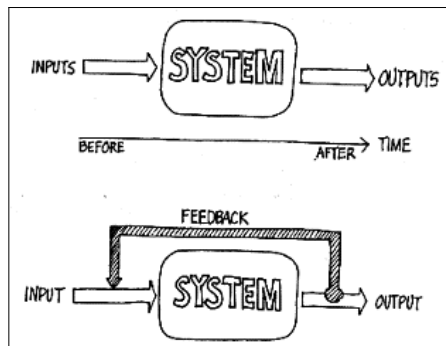


Diagram from Principia Cybernetica Project

Create a feedback loop (consider making it anonymous to minimise any employee fears). Pay attention to it and keep it open. A sample feedback form is included in Appendix D.

Don't Shoot the Messenger

"When you resort to attacking the messenger and not the message, you have lost the debate."

– Addison Whitcomb – Author

During the project you are highly likely to receive some unexpected and unpleasant results or feedback. Look carefully at what may have caused this – the likelihood is that the change project has identified a potentially significant flaw in the existing business processes that was never clearly identified previously. The new system may well uncover some nasty surprises that require forensic analysis to come to grips with. When you have identified what the cause is, you may need to go back and treat the symptom at the source, in isolation of the current change project.

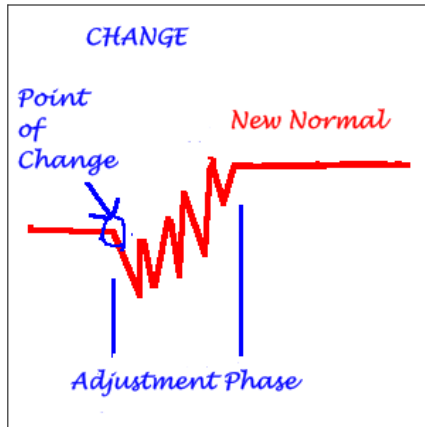


Diagram by Shoes full of dust

Professional Advantage had a client implementing a business intelligence (BI) solution. During the prototyping phase they questioned the accuracy of some of the data models against their normal sales reports. On further investigation it became glaringly obvious that the allocation coding for sales transactions in the source financial management system were not being enforced or validated. The BI results were correct, the source data business process was catastrophically flawed and had to be redressed as a matter of urgency.

Communication

Talk to Everyone

Have a look at all the people that are probably going to be affected by your project. Internally we have operations staff, support staff, management, trainers, payroll & admin staff, and don't forget families – maybe they will be affected by extra work hours in the short term, stress etc. Externally you may have customers, suppliers, shareholders, unions, government departments, industry analysts and journalists. All these groups might be affected by and interested in your project in some way. The least you could do is tell them why you are embarking on the project and what it will mean (if anything) to them.

Don't do it just the once; keep them updated as the project rolls out and particularly as you get to the relevant part for each group. Each group will also have a different take on what is important to them and what constitutes success and failure. Tailor your communications to address each group effectively. Remember that grey areas of communication can present serious challenges to the trust level of your communications. Work to eliminate any omissions or ambiguities in your communication and be sure that all possible “grey areas” of understanding are minimised.

Project Briefings for All Staff

A common complaint from the people on the periphery of change is that they will hear about a project at the start – when company management announces the bold new way – and possibly at the end – as an after thought in the end-of-year party speeches. Keep people up to date on the progress on a regular basis. They may not be directly involved but they could well be affected by those who are.

Collaboration Tools

Many companies nowadays have an intranet for internal company communications. If available, leverage this technology for two communication roles, a generic project overview and progress tracker for the wider community and a team collaboration area where your staff, vendors and partners can exchange and centralise documents, ideas etc. The front screen of an example project management intranet portal used by Professional Advantage is included in Appendix C.

Newsletters

If the company publishes regular newsletters, add a section to communicate what is happening on the project and celebrate small wins. If you don't have a newsletter think about creating one specifically for the project. It doesn't need to be a complex, commercially printed missive, a casual and regular update will do.

Questionnaires

At regular points throughout the change issue questionnaires to the various stakeholders that help quantify their understanding of the project and their confidence in going forward. You may wish to structure these to make the basis of a balanced scorecard for the project. A basic Professional Advantage questionnaire sample is included as Appendix A.



User Notification Forms

Wherever the change is going to alter the way someone does their work issue a notification alert a day or two prior to the transfer from old to new. People will have been on training and they will have been told what the rollout schedule is, however it is a simple courtesy and an effective reminder to put a “remember this” note on their daily work space just before switchover. Something friendly and unthreatening along the lines of:

“Remember the training you went through last week? Well now is the time to put it into practice. This morning when you login to the system you will see that we have rolled out our new environment overnight. The system will trigger you first-up to change your password – that’s normal. Rapid support is to hand throughout the day – just ask your nearest practice expert or call the project team on *phone number here*.

Please remember to fill in the attached feedback forms with any suggestions, ideas or ongoing issues you may have.”

Satisfaction Surveys

How will you know whether the system implementation is going well if you don’t ask the people that are undergoing the change? Structure regular satisfaction surveys so that your staff can tell you where things are flawed or can be improved. Give them the sense of ownership and responsibility for their areas and encourage them to get involved. Reward that involvement by addressing the issues they raise wherever possible or acknowledge the issue and flag it for addressing at some time in the future. Don’t pay lip-service to the staff; help them do their jobs as best they can.

Training

“The biggest job we have is to teach a newly hired employee how to fail intelligently. We have to train him to experiment over and over and to keep on trying and failing until he learns what will work.”

– Charles Kettering (American engineer)

Training is compulsory. No-one involved in the project can avoid undergoing a training regime for their area. Don’t assume the first training course for each person will be the only one. The more people’s confidence can be built up in their abilities to use the new system the more likely a successful outcome at a personal, divisional and enterprise level will be. If at all possible set up a “sandpit” where people can go to refresh their memories and re-apply their training in a simulation environment.

Remember also the difference between training and learning. Training is a premeditated process focused on achieving a new or modifying an existing outcome. Learning however is an invisible process performed by individuals of their own accord where they develop knowledge, strategies and skills to achieve an outcome. Very few of us had to be trained how to walk and run, we learned that on our own. To run as fast as we possibly can requires training, practice and repetition. Confident, happy and motivated employees will learn new processes with a minimum of training.

E-learning (individual, computer based training rather than classroom lessons) can be a very productive and cost effective way of providing initial and follow-up training to system users, particularly in a geographically dispersed organisation. This learning framework gives people the ability to proceed at their own pace in a non-threatening and independent environment. It also provides an ongoing training mindset where people can do refresher training and employees in new roles can get on-demand exposure to the correct procedures expected of them. An example of a Professional Advantage e-learning screen is included as Appendix B.



Training Schedule Publication

Publish the training schedule creatively, frequently and consistently – be it by email, flyer or loudhailer. Put up reminders on the specials board in the canteen, add a note to the bottom of peoples’ pay slips, give everyone a clear understanding that the training is for their benefit and in terms that they can relate to. “Once you have been trained and given access to the system you will be able to *do this with that in half the time you used to.*”

Annual/Quarterly Company Report

A project of any significance will have impacts across the enterprise – acknowledge the fact in the company reports and publish the benefits and milestone achievements. Make sure that the progress of the project is acknowledged at a corporate level and publicly commend the most deserving individuals and adopters of each phase in print.

Publish the Benefits Achieved as You Go

By now you will have spent significant time identifying the benefits, let everyone know about the achievements along the way. For example:

- We used to ship 60% of orders within 24 hours, now we do 80%
- We used to have 9% product spoilage, now we have 5%
- We used to have 30% purchase order fulfilment within 24 hours, now we have 60%
- We used to have 20% automated transaction management, now we have 55%
- We used to have 40% of invoices with PO number now we have 95%

If you have defined your quantifiable benefits and successfully pursued them throughout the project you can now measure your achievements and tell the world.



People

“If people don't buy into why changes or improvements are necessary, they will fight and resist them. Before people will want to improve, they need to agree with why they need to improve.”
– Jim Clemmer

Building the Change Management Team

A significant element of change management is actually all about people and in reality is more attuned with human resources management. Much effort will need to be spent communicating, educating, cajoling, training, disciplining, influencing, manipulating, commiserating and celebrating with people. With this in mind the choices you make for the members of the change management team are critical. They will need to be firm yet empathetic, authoritative yet encouraging, articulate yet comfortable in the vernacular, visionary yet practical, consultative yet decisive. Your change management team needs to be the cream of the crop, not the bottom of the barrel.

Involve Influential Employees

“Tell me and I'll forget, show me and I might remember, involve me and I'll understand.”
– Chinese proverb

Throughout the organisation there are a range of employees whose official and unofficial influence on their colleagues is greater than others, be it positive or negative – you know who they are (and if you don't you should start looking for them). They are the ground floor influencers on any number of day to day issues for the staff. Engage the “positive” influencers in your change management – involve them in the process – with their buy in you gain a groundswell of influence over much of the rest of the staff. Overcoming resistance to change can frequently be achieved through the positive influence of these people regardless of their formal position of authority.

Nominate Change/Practice Evangelists in each Workgroup

The first place people go for help with how to do things is the person beside them – that's human nature. Telephone helpdesks; knowledge-bases; bulletin boards; Google™ – are all fallback positions for most people. Identify and extensively train your change and system evangelists in all areas so that people with problems or questions can gain assistance rapidly and effectively. The quicker they get past a problem the more productive they will be and the more rapidly their confidence in the new system will grow. Evangelists can also provide targeted feedback to the project team on how training, communication, future testing etc can be improved and anecdotal support for the successes and failures of any specific area.

Educating all Stakeholders

Educate all stakeholders in how the change is going to affect and apply to them. Articulate the value proposition for the company and the specific perceived benefit for each stakeholder-group one-on-one. Company-wide announcements help people understand that change is coming but do not help them relate to the likely personal impact. People need a safe and appropriate forum in which they can ask questions and raise concerns – create one if it does not exist.

Stamping out Maverick Processes

Address discipline issues before system implementation. Such issues may be founded in ignorance, fear, confusion or malice – address all of them up front. Communicate and train. Sometimes if you can't change the process you may have to change the people.

Rewarding Excellence in Change Adoption

Gaining the maximum early benefits from the changes will stem from the willingness and commitment of the workforce to adopt the changes as rapidly and accurately as possible. In every team there will be individuals who rush in and others who hold back. Without a doubt the early adopters will always suffer frustration from teething problems as irregularities and kinks in the new processes and system are ironed out. It may be a welcome recognition of the dedication of these genuine early adopters to reward their efforts in some way appropriate to the company culture.

Supporting Slow Change Adoption

“It does not matter how slowly you go as long as you do not stop.”
– Confucius

People slow to change don't necessarily mean to be obstructive; frequently they just haven't yet grasped what is now expected of them and why. Their hesitation will often be based in a lack of confidence – either in their own abilities to adopt the new ways or in the system's capabilities to deliver. Supporting these people through improved, targeted communication and additional or refresher training will generally help them get over their confusion and concerns and enable them to get on with doing what they are charged with. Remember that not everyone wants to know what the big picture is in any great detail – some people just want to know the bit that affects them directly. The challenge is to identify for each slow adopter what support strategy is best suited to their needs.

Identifying New Roles to Support the New Processes

One of the outcomes of a business transformation may well be that additional roles need to be created to support the new processes. This should not be a surprise. It is likely that you will have culled some roles within other areas of the business during the project but that doesn't always mean those FTE (full time equivalent) will disappear, some of them may just move to an alternative area in the business where their efforts are more effective in delivering productivity gains.



Revisiting Post Implementation

Expect Unexpected Results

Post implementation reviews tend to occur as part of a project closure. They are held rapidly after the final tasks are completed and frequently well before the total transformation has bedded down, let alone the quantifiable benefits being meaningfully measured over an extended period of time. Come back to the project after the task based closure and review the outcomes.

Don't be surprised by unexpected results. Deal with them as you would have during the project itself. Fix it, formalise it or drop it and try something else.

What Processes are Wrong?

"One fails forward toward success."
– Charles F. Kettering

"The project has completed, the milestones reached, the goals achieved – we can all relax now and put up our feet." Wrong. The sheer experience of change causes further change. There are processes out there that can now be improved because the problems previously identified have been resolved or eradicated. It's time to go back and do it all again, perhaps focusing this time on specific areas rather than the end to end sweep of the initial implementation. Particularly areas where the benefits and gains identified are significant. A change culture encourages constant striving for greater effectiveness through increased efficiency – doing the right things and doing them correctly.

Do It Better Next Time

Talk to the people that yet again know the most about how the business operates – the system users. Many of them will be delighted to draw your attention to the shortfalls and deficiencies that exist in the new processes and indeed may have some brilliant ideas about how they can be righted. On the basis that what hasn't killed them has made them stronger the workforce in general may be more willing and open to the concept and culture of progressive change. It would be unfortunate to disappoint them by sitting back on your laurels and thinking the job is done.

Continual Monitoring

Once a business process is established it needs ongoing monitoring and review. It is important to guard against the introduction of process breach, work-arounds or increased administration. Always look to review and improve the process based on changes and additions made elsewhere.

Acknowledgements

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- E-Cocoon – business process specialists – www.e-cocoon.com
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- Jim Clemmer – management consultant and author – www.clemmer.com
- Value Based Management – management portal – www.valuebasedmanagement.net
- Principia Cybernetica Project – philosophical portal – <http://pespmc1.vub.ac.be/>
- Ivan Webb – educationalist – <http://www.users.bigpond.com/ivan.webb/quality/schools/index.htm>
- Tom Peters – the concept of “fast failure” in *Thriving on Chaos: Handbook for a Management Revolution*



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Started in 1989, Professional Advantage has over 200 staff in its Sydney, Melbourne, Brisbane and US offices. From inception we have built an impressive track record winning many awards from each of our vendors. In 2000 Professional Advantage was awarded a **top 10 ranking** by The Sydney Morning Herald in the Best Employer Survey and in 2002 was voted **'best value'** and **'highest customer satisfaction'** by the Australian Financial Review - Boss Consulting survey.

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info@pa.com.au or phone +61 2 9919 8900 or +44 0 1923 431 691



Appendices

Appendix A – Sample Change Management User Questionnaire

Your comments are invaluable to the approach and success of our change management project. Please take a moment to fill in this form and be assured that your input is respected and valued.

Company Name	
Your Name	(optional)
Your Job Title/Position	(optional)

Change Project	
Project Phase	
Change Manager	
Date	

1. Value of the Project

Don't know / Not at all / Somewhat / Completely

Please rate:

- If the project is consistent with the Business strategy
- Is the strategy documented / known
- Is there a business case
- Is the business case documented / known
- Are the benefits quantifiable
- Have the benefits been quantified

Further comments:

2. Awareness

Don't know / None / Somewhat / Completely

Please rate your awareness of:

- The existence of this project
- The project targets/goals/benefits
- The implementation schedule/timeline
- The impact to yourself on a day to day basis
- The project team and how to contact it
- What will be expected of you by the project team

Further comments:



3. Involvement in the Project

Please rate the involvement in the project of:

Don't know / Not at all / Somewhat / Completely

The Sponsor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
End users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are all the necessary parties involved at the right level:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How much time can you dedicate per average week?: _____

Further comments:

4. Impact of the Project

Please rate your understanding of the impact on:

Don't know / Not at all / Somewhat / Completely

Your day-to-day roles and responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your key performance indicators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management users'	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other end users'	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your customers'	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your suppliers'	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further comments:

5. Concerns

Please rate any concerns about the project on:

Don't know / None / Somewhat / Many concerns

The ability to do your job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The existence of your job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The roles and responsibilities of your job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your productivity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The effectiveness of your team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The stability of your dept/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The profitability of the company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further Comments:

6. Other Indicators

Please rate if you agree with the following:

Don't know / Not at all / Somewhat / Completely

It is an IT/Finance project	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Targeted benefits are worthwhile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The project is funded adequately	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risks are identified and contingencies planned for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality is defined	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Project Manager's role is to manage the work not do it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is a reliable, relevant Project Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management / staff performance measures are still relevant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further comments:



7. Understanding

Please rate your understanding of what to do if:

Don't know / Somewhat / Completely

- The project stops you doing your job
- The project stops your team from operating
- You feel the changes have a drastic negative effect
- You don't know what you should be doing
- You don't understand what is expected of you

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further comments:



Appendix B – Sample eLearning Framework

The screenshot shows a Microsoft Internet Explorer browser window. The title bar reads "Your Company eLearning - Microsoft Internet Explorer". The address bar shows the file path: "file:///C:/Temp/eLearning/iPOS/iPOSRequisitionTutorial.html". The page content includes a logo for "professional advantage" and a main heading "Your Company eLearning". A navigation menu on the left lists "Welcome", "iPOS Tutorial", "Policies & Procedures", and "OH&S". The main content area is titled "How will you use iPOS?" and contains a paragraph: "Roll your mouse over each of the buttons to learn more about each of the 6 iPOS functions. As a member of the general staff, you will need to learn about the requisitions function of iPOS." Below this text are six red, glowing buttons labeled "requisitions", "approvals", "control desk", "goods receipt", "invoice entry", and "invoice approval". A text box below the buttons explains the requisitions process. At the bottom of the page, there are navigation links for "PREVIOUS" and "NEXT", and a footer with copyright information and links for "HELP", "SURVEY", "ASK A QUESTION", and "PRINT".

professional advantage

Your Company eLearning

- Welcome
- iPOS Tutorial**
- Policies & Procedures
- OH&S

How will you use iPOS?

Roll your mouse over each of the buttons to learn more about each of the 6 iPOS functions. As a member of the general staff, you will need to learn about the requisitions function of iPOS.

requisitions approvals control desk goods receipt invoice entry invoice approval

Requisitions - this is where you request the purchase of goods and services on behalf of the company. The system will recognise what department you are in, who your manager is, where you are located, what you are allowed to buy. You can request the purchase of any number of items from any number of suppliers (including internal stores) and when you submit your request it will be forwarded to the relevant manager(s) for approval.

◀ PREVIOUS NEXT ▶

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file:///C:/Temp/eLearning/iPOS/iPOSRequisitionTutorial.html My Computer



Appendix C – Sample Project Management Intranet Portal

The screenshot shows a Microsoft Internet Explorer browser window with the following details:

- Address Bar:** <http://sunportal.pa.com.au/oem/ProjectX/default.aspx?ToolPaneView=0>
- Page Title:** Home - Project X - Pursuing Paperless Procurement - Microsoft Internet Explorer
- Navigation:** Home | Help
- Page Content:**
 - Project X - Pursuing Paperless Procurement** (with PLACARD logo)
 - Navigation Tabs:** Home | Shared Documents | Minutes | Agreed Actions | Project Team | Feedback | Budget | Schedule | Modify This Workspace
 - Business Case and Quantifiable Benefits:** Includes a 'New Item' button and a list of columns: Project Name, Project Description, Start Date, Project Sponsor Name. Text: "There are no items to show in this view of the 'Project Description Detail' list. To create a new item, click 'New item' above."
 - Critical Success Factors:** Includes a 'New Item' button and a list of columns: Factor. Text: "There are no items to show in this view of the 'Objectives' list. To create a new item, click 'Add new item' below."
 - Links:** Text: "There are currently no favorite links to display. To add a new link, click 'Add new link' below." Includes an "Add new link" button.
 - Critical Dates:** Includes a 'New Item' button and a list of columns: Due Date, Title, Status. Text: "There are no items to show in this view of the 'Critical Dates' list. To create a new item, click 'Add new item' below."



Appendix D – Sample Feedback Loop

Project X Feedback Support

Portal/Teamsite: projectX.companyname.com

Support email: projectX@companyname.com

Please assist us in improving our systems and processes. Complete this feedback form at any time during Project X implementation to tell the project team about any problems or suggestions you may have.

How do we contact you?

Name

Location

Email address:

Phone number:

Best time to call:

What feedback are you providing?

- System access required/problems experienced
- Training required Initial/Follow-up Function: _____
- Documentation required/incorrect/missing Function: _____
- Technical/performance issues
- Data content/integrity issues
- System configuration/operation issues
- Additional report/data view required
- System enhancement suggestion
- Process enhancement suggestion
- Other

Please provide further details below:



Appendix E – Sample Project Sponsor Responsibility Summary

The Project Sponsor is ultimately responsible for the success or otherwise of the project. The Sponsor's role is to ensure that the project is achieving its objectives and the projected benefits for the term of the project. The Sponsor has to ensure that the project balances the demands of budget, business needs, user needs and suppliers.

Throughout the project, the Sponsor 'owns' the business case and has specific responsibilities along the lines of the following:

- Oversee the development of the business case
- Ensure there is a coherent project team structure with a logical plan
- Define project expenditure approvals and tolerances
- Monitor and control the progress of the project at a strategic level and constantly review the business case
- Balance the impact of any proposed changes of scope, cost or time against the business case
- Track and mitigate risks to the business
- Communicate project progress in the appropriate corporate forums
- Organise and chair Project Board meetings including final post implementation reviews with all major stake holders
- Identify and recommend any potential further projects following completion of the project
- Authorise all project closure and legislative/compliance reporting documentation
- Determine the final benefits that were achieved and missed – planned and unforeseen
- Communicate project achievements in the appropriate corporate forums

The Sponsor is responsible for ensuring that the project remains on target, will achieve the expected business benefits and will be completed within acceptable budget and schedule tolerances. This additional set of specific responsibilities may include:

- Monitoring the project and the business case against unforeseen and/or influential events
- Ensuring the project remains focussed on the strategic goals
- Monitoring project costs and schedules within tolerances, managing any overruns and communicating in the appropriate forums
- Assessing the impact of potential changes on the business case
- Minimising overruns (tangible and intangible)
- Assessing and communicating changes in the general landscape or environment that may impact the project

The Sponsor is the key decision maker and shoulders responsibility for the inception, execution and completion of the project.



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