

# CGP'S HUMAN-CENTRIC ROADMAP TO CHANGE

## **"TRANSFORM UNCERTAINTY INTO OPPORTUNITY"**

The CGP Human-Centric Roadmap presented in this paper is a blend of lessons learned from multiple PMOs and transformations in B2B industries. The concepts within this roadmap can be applied to projects of all sizes and serve as a foundation for initiating and completing transformation efforts.



# Executive Summary: Navigating the Crossroads of Transformation

We're at a crossroads where buyer's remorse from failed and costly transformation efforts are guiding new initiatives. In the 1990s, consulting firms confidently offered comprehensive business transformation solutions. Today, they've shifted to solution-specific transformations, often focused on single actions like ERP implementations. These new approaches, and their respective roadmaps, often don't translate well to broader transformations, leaving businesses unsure about the latest leading practices.

## How our past stifles transformation success:

1. Management often sees comprehensive solutions as too expensive. In response, firms may cut corners, reducing the scope without a shared roadmap for assessing needs with clients. Similarly, clients sometimes push to remove key project leaders to save costs, which can weaken the project. Prompting some firms to offer training specifically to help clients avoid undermining the project's leadership.
2. Firms sometimes offer narrow solutions that are presented as comprehensive, when they are not, skewing leaders' expectations and dampening their willingness to invest in future projects. For example, a digital agency might sell a plan of website SEO and social media Ads as a full go-to-market strategy, overlooking broader marketing plan elements like, sales enablement, customer segmentation, and channel strategy.
3. Executives might hesitate, fearing that more team engagement will lead to change fatigue and burnout. But effective transformation requires consistent engagement – through surveys, town halls, and regular communication – to ensure success.

To overcome this I have developed an approach, built on two decades of real-world B2B experience from both the client and consulting perspectives, that reverses the conventional experience:

- **Conventional Approach:** Focus on financial targets, miss deadlines, struggle with building a change list (with or without consultants), then grapple with a new project tracking software.
- **Human-Centric Approach:** Start with a human-centric goals, map out the journey, adopt simple project tracking, nurture the transformation, and deliver business and financial results.

Right-size each step in the CGP Human-Centric Roadmap to align with project complexity and risk, to ensure a clear path forward. With this roadmap, your organization will confidently navigate transformation, manage risks, and achieve lasting success.

**The CGP Human-Centric Roadmap enables teams to anticipate and prepare for the steps that will lead to successful changes.**

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# Introduction

Have you ever tried to implement change in your organization, only to create more chaos? Struggled to keep track of everything or wondered if the changes were delivering value? This often happens because there's no clear roadmap guiding the process.

## Importance of a Roadmap

Without a roadmap, chaos ensues.

Without a clear vision for the future—your story of change—confusion takes over.

Your team will wonder:

1. Why the changes are being made.
2. Whether there's a reliable plan to execute them.

You might even find yourself questioning it.

**Emotions are an underappreciated indicator of change issues.**



## What do experts say?

Research shows that around 70% of enterprise transformations fail. This history of high failure rates creates fear, people expect failure.

## Instill Confidence

To succeed, you need not only a strategy built with a cross-functional team, but also the right roadmap to support it.

**With a strategy backed by a clear roadmap to your goals you can lead one of those rare organizations that successfully drives change.**

## A Goal for the Reader

**As you explore this roadmap, think back to past difficult transformations. Can you identify a part of the roadmap that was overlooked or rejected but could have changed the outcome? What would you change next time?**

# The Problems that Lead to Failed Transformation Initiatives

**Imagine a business with a new idea**—maybe it's aiming to save \$100 million with transformation efforts or adopting new enterprise software like a CRM (customer relationship management), or ERP (enterprise resource planning).

Here's the typical scenario:

The team sets a timeline, usually a year, to achieve these goals.

**After six months, only a fraction of the savings are realized, with no clear plan to achieve the rest.**

or

**The new CRM is installed, but employees aren't using it properly, and it hasn't become part of their daily routines.**

**Suddenly, it feels as though you're playing catch-up.**

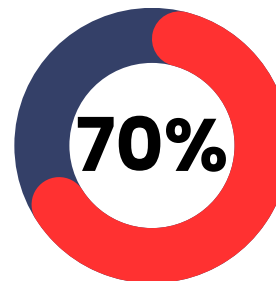
At this point, you might reach out to a consulting firm. They'll provide a list of suggestions to save money, but typically, only a few are implemented unless the consultants actively enforce them.

Similarly, you or a consultant may discover that the CRM doesn't meet your needs or align with existing practices.

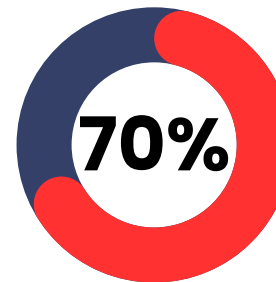
The result of those scenarios? Hire a consulting firm to implement project savings tracking software, build a CRM engagement process, or build an entirely new CRM.

## Stats

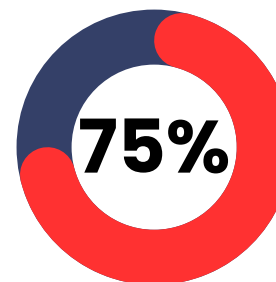
**These are the numbers clients have indicated were their past failure rates**



**of business transformations fail**



**of projects do not result in a measured P&L impact**



**of managers lack incentives linked to operational enhancements**



**months before discovering project failure or non-execution.**

# The Problems that Lead to Failed Transformation Initiatives

## Then the consultants leave...again

Without consultant oversight the team often stumbles. They don't feel ownership of the new solutions, which leads to frustration, confusion, and doubt.

**If the solution doesn't gain traction, companies typically give up or hire a change management consultant to restart the effort.**

## But maybe we have this backwards.

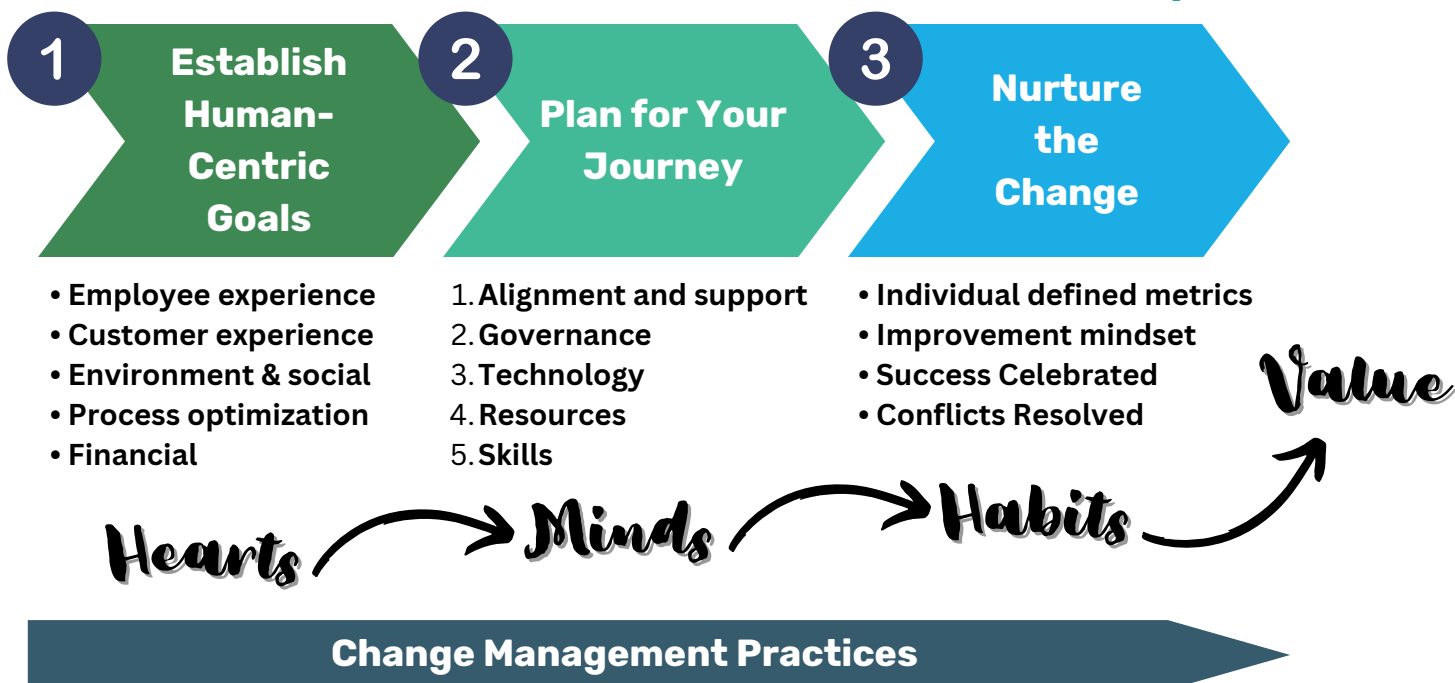
In my efforts, we flipped this conventional approach on its head. Instead of:

1. Setting a financial or implementation goal
2. Establishing a simple timeline for completion
3. Creating a long to-do list or complex Gantt chart
4. Implementing rigid and complex software

Begin, instead, with a human-centric approach. I've learned from experience—and the advice of an early mentor—that prioritizing people leads to success.

We also learned early on that the absence of a roadmap creates chaos, hindering change. You wouldn't set out on a journey without a map or GPS, right? That's why we've developed a human-centric transformation roadmap that instills confidence in your team, whether you're undergoing an AI transformation or general business process improvement.

## The CGP Human-Centric Transformation Roadmap



**You have the roadmap, take detours and shortcuts at your own peril...**



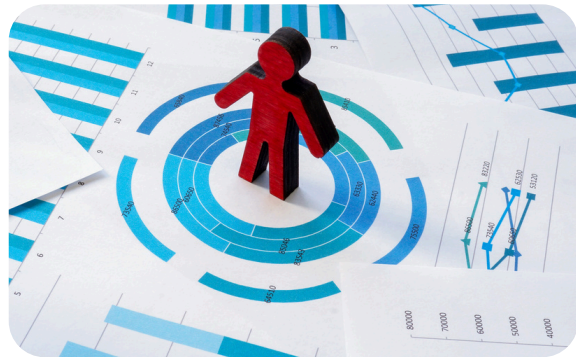
# Steps to Capture Team Engagement

## Engaging Employees

Employees are the recipients of process improvements, making their inclusion in transformations essential. To do this effectively, they need to learn how to ideate, plan, and execute business improvements independently while managing these projects alongside their existing responsibilities. They must also be motivated to change, which is why the business should adopt and follow a leading change management process that includes a communications plan, feedback loop, and stakeholder engagement.

### 1 Human-centric goals

Define your success criteria by including employee, customer, and social impact goals. Clear financial targets and a vision should be developed before starting a transformation. Do this with a strategy that incorporates cross-functional employee feedback.



### 2 Plan Your Journey

Follow the CGP Human-Centric Roadmap as a guide to your destination.

Include elements like a governance model, sources for external resources, required technology, necessary employee skills, and provide a plan that ensures alignment from top to bottom.

### 3 Nurture behaviors

Remember, it's a human-centric approach. Reinforce your roadmap by nurturing desired behaviors. Promote continuous improvement, adaptability, and celebrate successes at both the macro and micro levels within your team.



# 1 Establish Human-Centric Goals

## Employees prioritize their own well-being

The typical approach is to ask employees to change—like meeting a new revenue goal or adopting a CRM system—to achieve financial goals and streamline operations. However, these goals often don't resonate with employees, they don't motivate them to change long-established habits, and historically lead to frustration. We have experienced this from both sides, such as aligning 40 global leaders on a new CRM and corrected a multi-billion-dollar company's board on how it wouldn't operate as they expected. Personally avoided CRMs that appeared to bring no value, but also successfully led a technical team to adopt a CRM because it helped them share their exciting projects/leads and supported a nervous sales team.

Employees are more motivated by their experiences and the impact on customers than by leadership's cost-saving initiatives. Companies with successful transformation programs focus on holistic, human-centric success criteria, including social impact.



## Build Support for Change

To drive real change, key elements like a roadmap and the right tools must be in place. Address any gaps to avoid resistance. For example, employees often get frustrated with new tools. You can mitigate this by providing proper training, clear explanations of their value, and involving employees in the build process. If overwhelmed with volunteers for the build process, use surveys and rotate participation to keep the team engaged.

## The metrics

KPIs (Key Performance Indicators) and OKRs (Objectives and Key Results) will help you set both non-financial and financial targets. Start by establishing a baseline of your current operations. Then, set reasonable and aggressive targets within small teams. I've had teams present their targets to colleagues for feedback in one-on-one meetings and town halls to drive empowerment and accountability. Tools like [Mentimeter](#) can gather real-time anonymous feedback during these meetings...this is also a good time to discuss your governance model with the team.



# Plan Your Journey

After setting human-centric goals, the tactics that deliver the best results for affecting change can be divided into five buckets. Let's explore those here and how you can use them to implement change at your company.

## 1. Alignment and Support

This "bucket" is foundational for transformation: it aligns leadership with line operators so they share a common vision and success criteria. It's crucial for the entire team, from leadership to line workers, to believe in the same change story to avoid confusion.

In every project we've run, there's been a detractor whose voice can delay progress by weeks. A simple 15-minute call to address their concerns can significantly reduce their negative influence. If a manager becomes a detractor, their dissent can fester, so engage their trusted advisors to influence them, and maintain consistent confidence when interacting with them. On the other hand, connect with supporters and equip them with positive information to share.

At the transformation level, alignment and support are nurtured by effective change management activities. A leading practice communication plan helps drive and track success as well as stakeholder management. With it you will quickly identify issues, allowing you to adjust communications, provide additional training, gather feedback, and elevate success.

Ensure leaders are fully engaged in the process. Involve them in developing tools to track progress, this will create ownership and accountability for them.



### Case Study

#### **Revenge is a dish served cold:**

A consulting change management leader proposed a comprehensive solution, but the executive sponsor rejected it due to its scope and cost. Instead of right-sizing the plan, they reused a generic communication strategy without aligning their leaders. As a result, staff and leader objections were ignored. After 1.5 years and \$1 million in consulting fees, the project was shut down by a sidelined leader who became the temporary CFO.

# 2

## Plan Your Journey

### 2. Governance

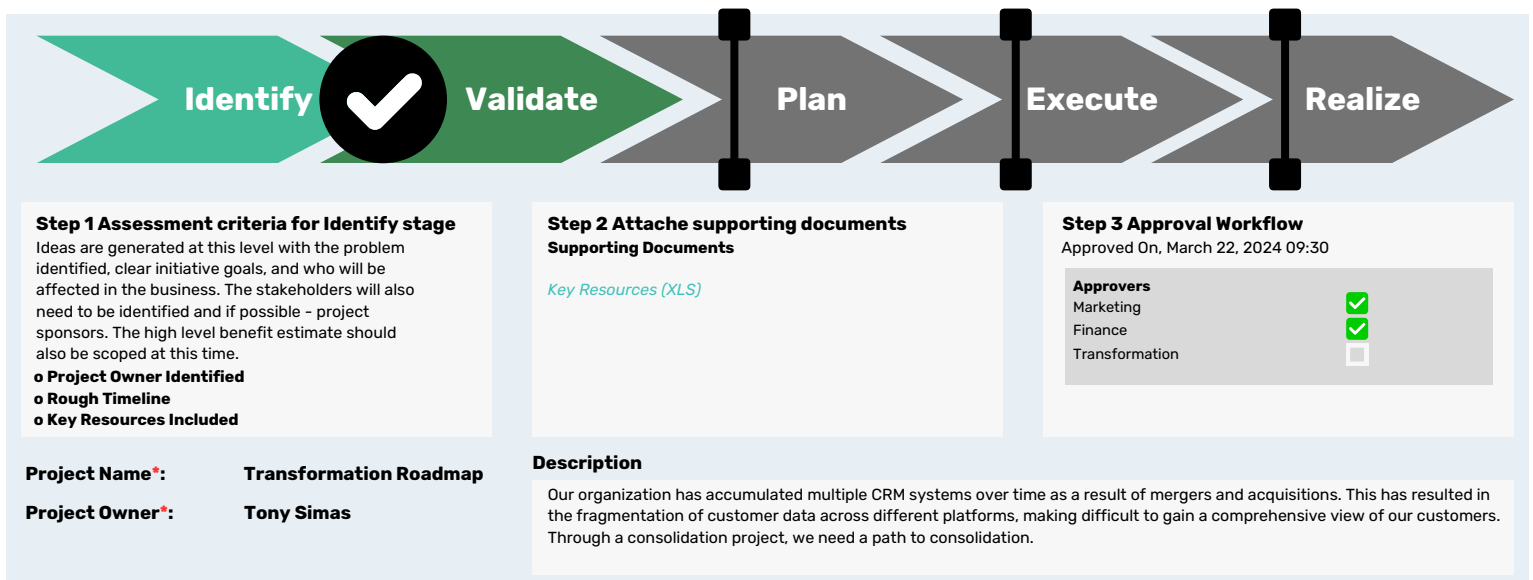
Set up governance to ensure transparency in decision-making and dispute resolution. Define who's responsible for what, how decisions are made, who makes the final call, and who needs to be informed. Transparency is key to building trust throughout the process. Sometimes, a leader may resist using a RACI due to the time it takes to set up and its complexity. An alternative is to build approvals into a standardized project plan, as visualized below.

The more hierarchy is involved, the lower the likelihood of success. A flat organization can be intimidating, often leading to decision-making processes being established only when issues arise. Don't wait for high-stress situations; establish these processes when things are calm. Swimlanes can help visualize the process upfront. In other scenarios, We've seen leaders yell "EMPOWERMENT" and then flee! Instead, set high-level OKRs and goals, and encourage your team to refine them as they gain more insights. See, that was easy—no need to run.

Good governance motivates people to change. This should include financial rewards, but more importantly, reward behaviors that align with the desired cultural changes.

To ensure proper governance, consistent processes are required. Choose a tool for tracking and reporting project progress, again don't wait or let people use disparate systems.

The tool we use standardizes decision steps for projects, allowing departments or initiatives to customize requirements for each step. Although seemingly mundane, naming the steps can be crucial, as we have seen it become a point of contention many times. These steps are vital for rolling up projects into a single chart, enabling leaders to pinpoint and prioritize the most important projects.



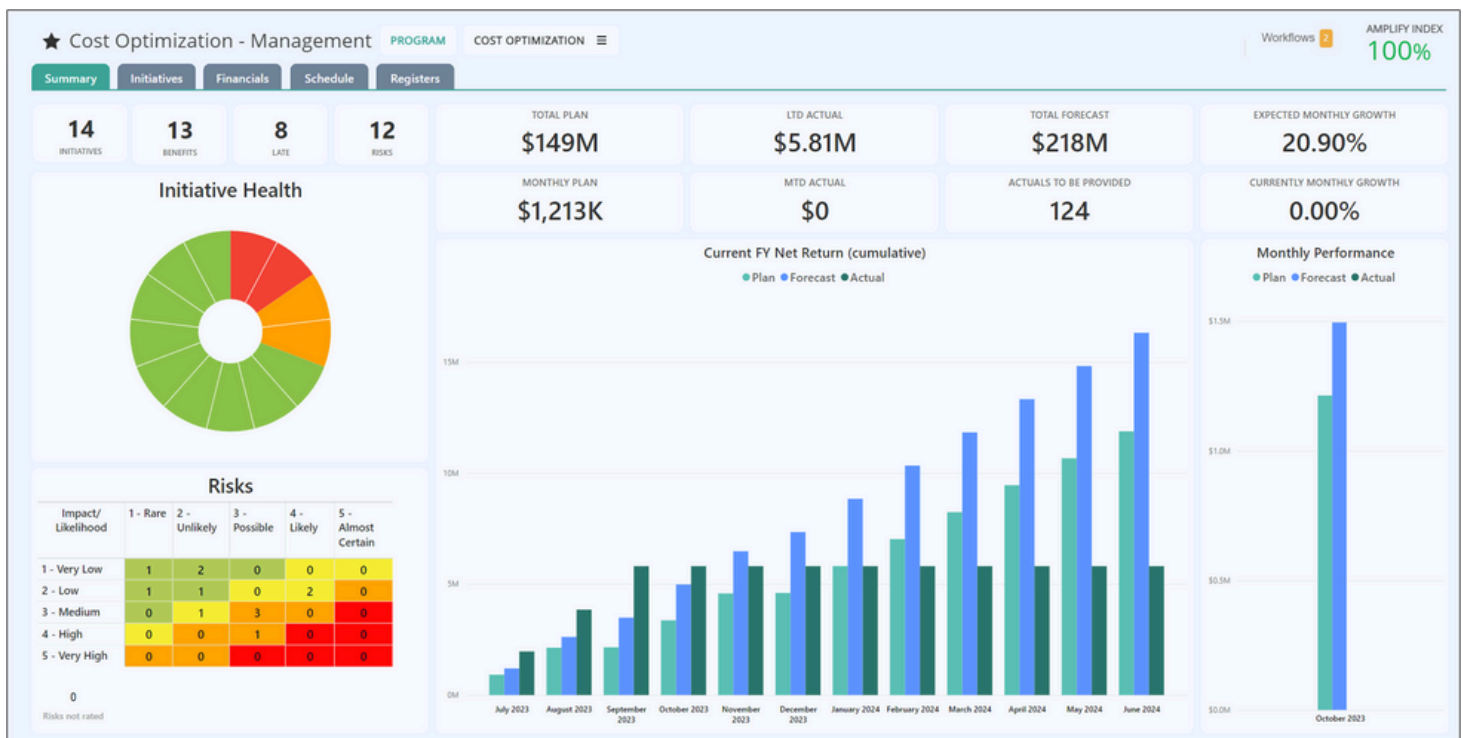
# Plan Your Journey

## 3. Technology

Knowing your technology means understanding your capabilities. Does your technology stack enable full, end-to-end processes and is it flexible enough to be modified? Will it allow you to automatically update your P&L when a process changes and vice versa? What technology can you implement to track your initiatives and accurately measure both financial and non-financial benefits? Matching technology to specific needs can help mitigate discord. For instance, in business optimization, measuring and tracking non-financial targets often becomes a point of contention during project ideation and prioritization.

Similarly, can you deploy new technologies to support project implementation and enhance decision-making? The right technology will help you become more agile and reduce barriers, but it must fit your needs. This is easier said than done—complement your team with experts who can perform build-or-buy software analysis, invest in a comprehensive RFP process, and have experts match features to the employee who will be responsible for adopting them. Don't forget a contingency plan for when the responsible party is on vacation or is promoted.

Our preferred project tracking technology addresses these issues by enabling non-financial target tracking, allowing flexibility in customizing processes and terminology, and a dedicated account manager who focuses on technical support. This approach also ensures that projects can be consolidated into dashboards without changing your existing business processes.



# Plan Your Journey

## 4. Resources

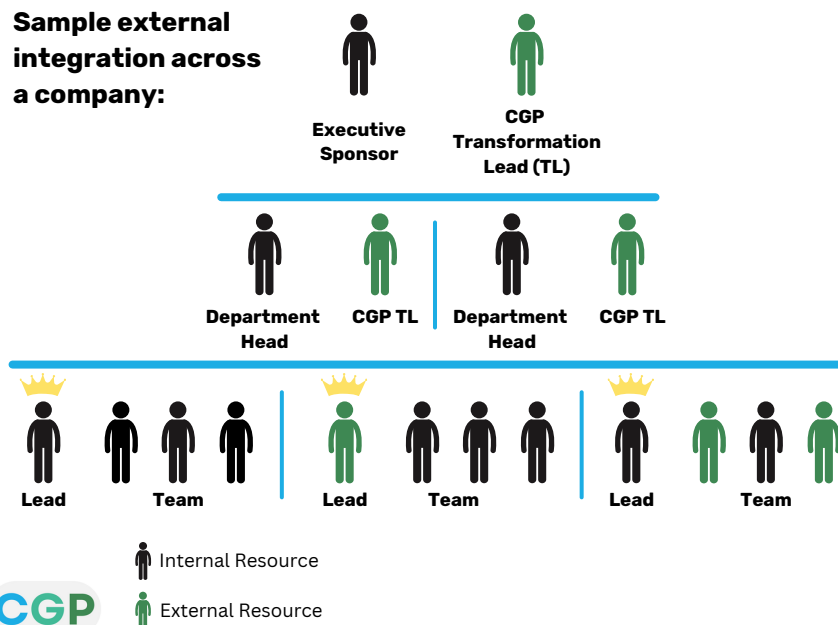
For optimal performance, you need to balance internal and external resources to address any competency or availability gaps. Consider a transformation leader who can be a thought and skill partner at every level, from the CEO down to the analyst-level “doer,” this will enable your team to make the most of their talents.

If you have any talent gaps you need to address, don’t be afraid to engage external experts for quick, risk-free support. These external resources can be valuable for few reasons:

- External resources, especially independent consultants, can be available within 1-2 weeks and focus on transitioning responsibilities back to your team when their work is complete.
- They have no politics, no ‘skin in the game,’ no baggage,’ only focused on project success.
- They don’t have the risk, commitment, or hassle of onboarding a new hire.
- This talent arrives with a “self-homing device,” seeking out specific outcomes based on years of functional experience. Typical external skills leveraged are:
  - Spend analysts and RFP negotiators
  - Specialized supply chain or operations specialists
  - Salesforce.com/CRM enablement experts
  - Marketing functional experts such as Marketing Strategist or Brand Manager

External resources are ideal for jumpstarting or debottlenecking projects, whether it's planning, initiating, or getting them unstuck. For example, executives often feel overwhelmed by the demands of marketing agencies to update a website. A marketing communications consultant can assess the need, review vendor proposals, and recommend a path forward to the leadership team. **Otherwise, the projects linger for months delaying value achievement.**

**Sample external integration across a company:**



## Case Study

Years ago, a leader hired a consultant to assist me, but I perceived no value and refused to work with them. A few years later, as a consultant, I guided a manager through creating a new process that they loved and fully adopted. However, just a few months ago, I developed a process during a manager's onboarding, but they didn't have time to review it, and the company didn't hire an SME to launch it. As a result, the process was delayed by months. **The takeaway? You need to train and motivate your team on how to leverage resources, not just provide them.**

# Plan Your Journey

## 5. Skills for transformation

Your team has been doing their jobs for years, but now you want them to improve the company and change how they work. To achieve the best results, equip them with practical transformation skills. But what are these capabilities?

**The following are skill boosters we use for nearly all projects:**

### Simplified project management

Focus on being Agile by starting projects with basic descriptions, projected value information, and clear, simple milestone requirements. Not everyone needs a Lean Six Sigma Blackbelt. A full project charter has its place, but not for every project. Avoid wasting days or weeks on overly complex plans.

### Methods for customer centricity

Teach skills like Design Thinking, which helps teams put the customer at the center of every project. We have found it is not just about doing what the customer asks—teams that understand this nuance are often the most profitable—it is about what the customer wants and can do.

## Tools to drive ideation and challenge the status quo

You don't want paint-by-numbers teams. You want people who can brainstorm from scratch and attack ideation with genuine openness. You can get concrete with these skills by using models like the Seven Degrees of Freedom for Growth or the Galbraith Start Model. Even a SWOT analysis might help. The key? Using these models for inspiration, not for a paint-by-numbers approach that eats up precious time with lengthy conversations about "is it a threat or is it an opportunity."

**Avoid the old adage of letting perfection get in the way of progress.**



### Note:

Changing how someone works goes deeper than a functional change—people often tie their identities to their work. It's essential to address the emotional impact during goal setting and change management.



## Nurturing Change

After winning people's hearts with human-centric goals and changing their minds with a solid plan for your journey, the next step is changing their habits.

Socrates believed in habituation to effect change, and it's commonly accepted that people need to hear, see, or experience something seven times to truly learn it. Keeping your team on the path you've set will require significant effort. Having a leader fully focused on your transformation, at the executive level, to support daily activities and reinforce these new habits is crucial—a role now often institutionalized as the Chief Transformation Officer.

As a leaders, we embodied this approach in every project and you can too. These are the tactics that have consistently delivered results:

- **MAKE. IT. FUN!** Celebrate success regularly. A newsletter highlighting achievements is a great addition to your communications plan. Walk the floor when on site and chat with all.
- **Communicate Constantly:** Share insights and the value delivered by the team.
- **Foster an Improvement Mindset:** Conduct activities and training that encourage continuous improvement.
- **Develop Smart Metrics:** Help departments refine KPIs and OKRs. This is the true essence of "empowerment," we all spoke about in the past.
- **Resolve Disputes Thoughtfully:** Go beyond being a tie-breaker—explain how decisions are made and how they fit into the big picture, so leaders can apply this thinking in the future.
- **Challenge the Status Quo:** Encourage everyone to challenge norms and ensure leadership supports this when it happens.
- **Celebrate Collaboration:** Success is when two people build on each other's ideas and both are equally celebrated, not just the last person with the 'better idea.'

**True change occurs when these practices become everyone's responsibility and are embedded in the organization's DNA.**



# Building a Strong Base through Change Management

## Change Management Practices

### Prepare for objections and lessen their impact

I recall a time when I was helping an organization transform its central functions. Unit leaders began to resist, saying things like, "We're going to lose services. Other departments will benefit more than we will."

You can anticipate and mitigate negativity by clearly articulating the "greater good" everyone will gain. This is an example of a mitigation tactic within a communication plan. A strong transformation program is supported by a change management plan that leverages historical experience and surveys to build an effective communication strategy.

This includes preparing for anticipated objections. Your team will see that you haven't just slapped a timeline on goals but have anticipated resistance and addressed concerns thoughtfully.



### A feedback loop

Effective communication is going to be key and should be a continuation from your strategy development. As you start to affect change, perform a readiness assessments. Conduct surveys and interviews. Engage people in shaping the change. Establish a baseline for measuring its effectiveness, and consider using heat maps to present stakeholder sentiment and the anticipated impact of different communication mediums on various stakeholders.

As the change progresses, keep communicating and measuring against your baseline with simple surveys.

Address any training needs and update your communications documents to keep both leaders and team members informed.

For significant changes, consider hiring a professional change management team.

# Conclusion



## CHART YOUR PATH WITH CGP'S HUMAN-CENTRIC ROADMAP

### CGP Transformation Roadmap Risks and Mitigations

1. **Resources:** Large firms often can't keep expensive consultants on standby. CGP addresses this by blending company and consulting leadership expertise, leveraging a global network of independent consultants to support existing staff and prevent burnout.
1. **Chief Transformation Officer:** This role is a significant investment. However, a consultant with both company and consulting leadership experience can effectively dive deep with the team and support projects, as an alternative.

**The human-centric model is crucial for successful change. Instead of setting a goal and expecting people to align, focus on building a change roadmap that starts at the human level. Let this approach drive business results.**

**Remember, you don't change habits until you change minds, and you don't change minds until you change hearts.**

Reach out for help building your roadmap!



**Tony Simas**  
Managing Partner

Over the past 20+ years, Tony has held multiple business and consulting leadership roles. He has successfully managed multiple PMOs and transformations. His efforts have led to businesses growing profitably at 3x the target growth rate, reducing product waste by 30%, \$1B budget model redesign, and aligning global teams on enhanced business plans for digital and legacy products.

Tony has experience across a breadth of B2B industries, including Chemicals, Technology (AI, SaaS, IoT), Coatings, CPG, and Plastics.

C-Suite and Board Transformation Experience: BASF | Ecolab

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# Bonus:

## AI Transformation Quick Hits

Implementing AI goes beyond adopting new technology—it's about transforming your organization. Be cautious of generic advice that doesn't address AI-specific needs. Here are some key considerations for a successful AI integration:

### 1. Normalize AI

AI is already in use across sectors, from search algorithms to medical diagnostics. However, it often evokes strong emotions and misconceptions, especially as it changes the way people work. Align your team's understanding and expectations through comprehensive training and workshops tailored to your business.

### 3. Clarify Internal and External Responsibilities

Define clear roles and accountability for AI initiatives. Decide what skills and resources to develop in-house. Establish partnerships and engage in industry-wide conversations to leverage insights and strengthen your AI strategy.

### 5. Manage Change

AI can significantly alter decision-making and time management. Engage all levels of the organization in the transition, addressing both emotional responses and the need for new skills, tools, and processes. Effective change management is crucial for a smooth AI integration. Of course also use the CGP Transformation Roadmap to chart your path.

### 2. Invest in Quality Tools

While free AI tools may be tempting, they come with risks like data privacy issues and biases. Investing in high-quality, paid AI tools ensures tailored solutions that offer better privacy, security, and protection of your intellectual property, leading to a positive ROI. Stride is a full service firm to consider.

### 4. Track Impacts

Set and monitor OKRs and KPIs that align with your scenarios and risk tolerance. Celebrate early wins to build momentum. Build open communication to learn from unexpected outcomes and have a plan for when to pivot or stay the course.

### 6. Acknowledge Emotions

Jobs may change or be eliminated due to AI. It can assist with low-complexity and low-value tasks, allowing humans to focus on more engaging work. Transparent communication is crucial to manage expectations and dispel negative assumptions.



# Prelude: Navigating the Crossroads of Transformation

We are at a crossroads where buyer's remorse from numerous failed, expensive transformation solutions are guiding new initiatives. In the 1990s, consulting firms presented comprehensive solutions with confidence, but now they have shifted to solution-specific roadmaps, often tied to single actions like ERP implementations. These new roadmaps are frequently not transferable to general transformations, leaving businesses unclear about the evolved leading practices.

## Case Studies

**Ignoring Change Management:** A previous effort failed due to poor tools and a singular focus on financial targets. Six years later, leadership declined change management because only a few staff had experienced the previous failure. These individuals shared their negative experiences with all of their colleagues. Without a change story or training, the improved tools and methods were rejected, halting the project after ten months and over \$400,000 in fees.

**Comprehensive Solution Rejected:** A consulting change management leader proposed a comprehensive solution, which the executive rejected due to its scope and cost. Instead of right-sizing it, they reused a generic communication plan and did not align their leaders to it. This led to disregarded objections from staff and leaders. When the executive sponsor left after 1.5 years and \$1m invested, the project was shut down by a disregarded leader who became the temporary CFO.

**The Siloed Approach and Its Fallout:** A company needed to reorganize its reporting hierarchy. A large consulting firm performed an assessment without beginning with employee-centric goals, a change assessment, or other leading practices. They produced a new structure, which the executive team implemented. Without context, managers and staff felt disconnected, leading to departures of people who were critical to the new organizational design.

Perceived Consequences of Comprehensive Solutions That Often Stifle Transformation Success:

1. Management views comprehensive solutions as inherently expensive. As a result, firms use their intuition to reduce the scope without a common language to assess the need together.
2. Firms with narrow functional solutions present them as comprehensive, skewing the leader's vision and appetite for future investment. For example, a digital agency may sell a plan focused on SEO and social media as a comprehensive go-to-market strategy, but it often lacks broader elements like sales enablement, customer segmentation, and channel strategy.

A balanced approach can be achieved by leveraging **learnings from the past decade and real-world B2B light industry experience from the client and consulting sides**. The CGP Transformation Roadmap can be risk-adjusted as a common framework to increase success.

## A Goal for the Reader

As you learn about this roadmap (page 6), consider past difficult transformations. Can you identify a part of the roadmap that was overlooked or rejected but could have changed the course and improved outcomes with some consideration?