



Inspire. Motivate. Improve. Network.

IMIN NETWORK

NAVIGATING CHANGE

3/13/2024



The image features a light gray background with a subtle gradient. In the top-left and bottom-right corners, there are several realistic-looking water droplets of various sizes, some overlapping. The text is centered in the upper half of the image.

HOW TECH-SAVVY ARE YOU?

slido

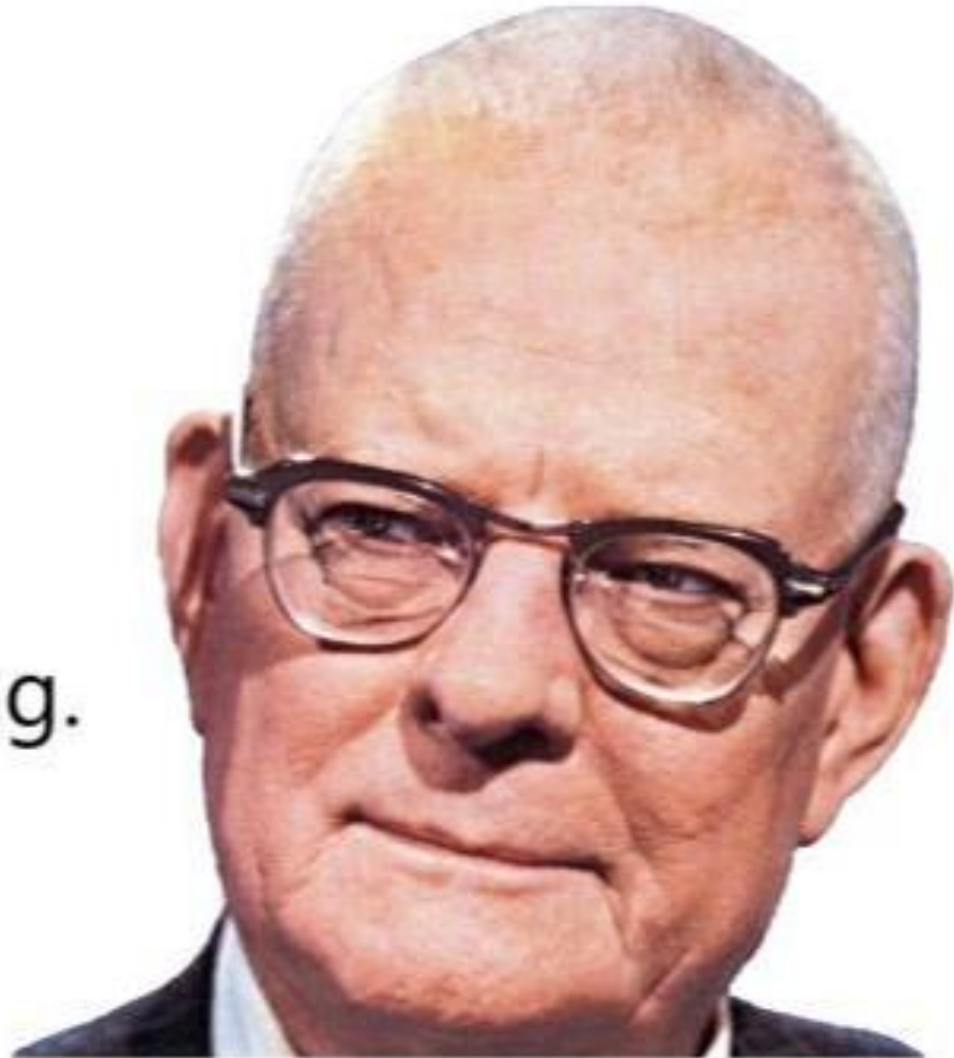


How tech-savvy are you?

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If you can't
describe what
you are doing
as a process,
you don't know
what you're doing.

William Edwards Deming





Inspire. Motivate. Improve. Network.

WELCOME

- INTRODUCTION
- EVENT PROCESS
 - PART 1 will be an interactive presentation
 - PART 2 is an opportunity to put it into practice



UNDERSTANDING THE CHANGE PROCESS

...AND WHY IT'S IMPORTANT

- **WHAT IS CHANGE MANAGEMENT?**
 - **YOUR PART**

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What is change management?

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UNDERSTANDING THE CHANGE PROCESS

...AND WHY IT'S IMPORTANT

- WHAT IS CHANGE MANAGEMENT?
 - YOUR PART

Change management is the systematic approach that businesses and organizations use to implement changes effectively. It involves developing and delivering strategies to navigate transitions, ensuring that people adapt smoothly to these changes.





UNDERSTANDING THE CHANGE PROCESS

...AND WHY IT'S IMPORTANT

- **WHY CHANGE MANAGEMENT?**
 - **YOUR PART (AGAIN)**

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Why do we need change management?

ⓘ Start presenting to display the poll results on this slide.

UNDERSTANDING THE CHANGE PROCESS

...AND WHY IT'S IMPORTANT

- WHY CHANGE MANAGEMENT?
 - YOUR PART (AGAIN)

Reasons for Change:

- **Implementing New Technology:** When introducing software, systems, or tools.
- **Leadership or Management Turnover:** Managing transitions due to changes in leadership.
- **Work Culture Shifts:** Adapting to new norms, values, or practices.
- **Mergers and Acquisitions:** Integrating two organizations.
- **Process Optimization:** When existing practices aren't efficient.
- **Staff and Structural Changes:** Reorganization, role adjustments, etc.
- **Crisis Situations:** Maintaining stability during challenging times.

UNDERSTANDING THE CHANGE PROCESS

...AND WHY IT'S IMPORTANT

THE CHANGE MANAGEMENT PROCESS

- 1. PREPARE FOR CHANGE:** Understand the necessary changes and prepare staff and stakeholders. Communicate the process, address concerns, and gain buy-in from employees
- 2. PLAN AND STRATEGIZE:** Develop a comprehensive strategy considering all factors impacted by the change (e.g., staffing, costs, training).
- 3. IMPLEMENT THE CHANGE:** Execute planned changes, monitor progress, and address issues.
- 4. SUPPORT ADAPTATION:** Help employees adapt through training, support, and ongoing communication.
- 5. EVALUATE AND ADJUST:** Continuously assess effectiveness and make necessary adjustments

UNDERSTANDING THE CHANGE PROCESS

...AND WHY IT'S IMPORTANT

WHY IS CHANGE MANAGEMENT IMPORTANT?

- 1. SMOOTH TRANSITIONS:** Change management ensures smoother transitions, minimizing disruptions during organizational changes.
- 2. EMPLOYEE PREPAREDNESS:** Employees need to be ready for changes. The process ensures everyone is on the same page.
- 3. EFFECTIVE IMPLEMENTATION:** Proper planning and execution lead to successful adoption of changes.
- 4. MEASURING IMPACT:** Change management helps measure the effects of changes across the organization.
- 5. OPTIMIZED PROCESSES:** By addressing inefficiencies, organizations can improve their practices.




UNDERSTANDING THE CHANGE PROCESS

...AND WHY IT'S IMPORTANT

IN SUMMARY:

Change management is essential for maintaining agility, adapting to evolving needs, and achieving organizational goals.



ASSESSING THE CURRENT STATE AND DEFINING THE DESIRED FUTURE STATE

ASSESSING THE CURRENT STATE:

- **FOUNDATION FOR CHANGE:** Before embarking on any change initiative, it's essential to understand where you currently stand. This involves analyzing the existing processes, systems, culture, and organizational structures.
- **ROOT CAUSE IDENTIFICATION:** A thorough current state analysis allows you to identify the root causes of challenges or inefficiencies. It's not just about addressing symptoms; it's about understanding the underlying issues.
- **COMMON UNDERSTANDING:** By assessing the current state, you create a shared understanding among stakeholders. Everyone involved needs to be on the same page regarding the organization's current situation.
- **QUANTIFYING REALITY:** Quantifying aspects like strategic priorities, team norms, and people's needs provides a factual basis for decision-making.
- **AVOIDING ASSUMPTIONS:** Without a clear current state, assumptions can lead to frustration, delays, and unmet expectations during the change process.

ASSESSING THE CURRENT STATE AND DEFINING THE DESIRED FUTURE STATE

DEFINING THE DESIRED FUTURE STATE:

- **VISION AND DIRECTION:** The desired future state represents the organization's vision. It's where you want to be after implementing the changes. Defining this state provides direction and purpose.
- **GAP ANALYSIS:** Comparing the current state to the desired future state reveals the gap that needs bridging. This gap represents the necessary change.
- **CHANGE SCOPE:** By defining the future state, you determine the extent of change required. It guides decision-making and resource allocation.
- **ALIGNMENT AND COMMUNICATION:** Communicating the vision of the future state aligns stakeholders and motivates them to work toward a common goal.
- **PLANNING THE JOURNEY:** Just as any journey needs a roadmap, change management requires a clear path from the current state to the future state.

ASSESSING THE CURRENT STATE AND DEFINING THE DESIRED FUTURE STATE

IN SUMMARY:

Assessing the current state grounds your change efforts in reality, while defining the desired future state provides direction and purpose. Together, they form the foundation for successful organizational change.

DEVELOPING A COMPREHENSIVE CHANGE MANAGEMENT PLAN

THE PMBOK GIVES FOUR MODELS FOR THINK ABOUT WHEN TALKING CHANGE MANAGEMENT

VIRGINIA SATIR CHANGE MODEL - PEOPLE

- **LATE STATUS QUO:** This is where we start. Everything still feels normal and familiar.
- **THE FOREIGN ELEMENT:** Something Happens that upsets the status quo.
- **CHAOS:** Suddenly people are in unfamiliar territory. Performance drops to its lowest level. Feelings, actions, and behaviors are unpredictable. Can cause anxiety. Some thrive here, but most don't.
- **THE TRANSFORMING IDEA:** People develop an idea that helps them "get it". It could also be a method, or a tool. They see the light at the end of the tunnel, and performance starts to improve again.
- **PRACTICE AND INTEGRATION:** People try to implement their idea. Maybe it works right away, maybe it doesn't, but eventually they figure out what does work, and performance improves.
- **NEW STATUS QUO:** Acclimation happens, and performance stabilizes. The new normal is accepted.

DEVELOPING A COMPREHENSIVE CHANGE MANAGEMENT PLAN

THE 8-STEP PROCESS FOR LEADING CHANGE - MECHANICS

1. **CREATE URGENCY:** Identify potential threats and opportunities. Support it with data
2. **FORM A POWERFUL COALITION:** Identify change leaders and make a team.
 - What makes a change leader?
 - Beware the HiPPO!
3. **CREATE A VISION FOR CHANGE:** Identify the values that are central to the change.
4. **COMMUNICATE THE VISION:** Constantly review and cast the vision. A critical element of this is consistency across all levels and areas of the company.
5. **REMOVE THE OBSTACLES:** Pave the way. This can mean a lot of things: understanding the process, recruiting experts, facilitate social interaction, or even riding the political tides of the organization.
6. **CREATE SHORT-TERM WINS:** Quick wins provide momentum and support for the change.
7. **BUILD ON THE CHANGE:** Set long term goals.
8. **ANCHOR THE CHANGES IN CULTURE:** More vision casting. Share success stories. Give sincere recognition where its due. Provide “after-care” support

DEVELOPING A COMPREHENSIVE CHANGE MANAGEMENT PLAN

SUMMARY

A Change Management Plan has to do with both People and Mechanics, and often will require changes to systems, behaviors, activities, and cultures. You're trying to use your influence to persuade others to change in a way that starts with making them uncomfortable.

**When we say: "Hi, I'm from Continuous Improvement..."
They hear: "I notice your baby is ugly, but don't worry we can fix it..."**

COMMUNICATING CHANGE EFFECTIVELY TO STAKEHOLDERS

- WHO HAS THE INFORMATION?
- WHO NEEDS THE INFORMATION?
- WHAT INFORMATION DOES EACH STAKEHOLDER SPECIFICALLY REQUIRE?
- WHERE DO WE SHARE INFORMATION – METHODS?
- WHEN IS INFORMATION NEEDED?
- WHY SHOULD INFORMATION BE SHARED?
- HOW OFTEN IS INFORMATION NEEDED?

- OTHER CONSIDERATIONS:
 - Repetition
 - Internal or external
 - Sensitive or public
 - General or detailed

COMMUNICATING CHANGE EFFECTIVELY TO STAKEHOLDERS

OTHER THOUGHTS ON COMMUNICATION

- **BE OPEN TO FEEDBACK:** While change management is a top-down process, it's not a one-way street.
 - We need to take time to listen, and the feedback process is where you gain perspectives, insights, and direction from the customer.
 - The customer is not always the end user. It is always the person footing the bill.
- **RESPONSIBILITIES/ROLES:**
 - Is this something this role needs?
 - How does that shape their perspectives?
 - What kind of bandwidth limits does this person's job require of them?
- **PERSONALITY:**
 - DiSC, Enneagrams, Myers-Briggs, Four Color Personalities, EQ test
 - Find a system you can think in and develop your soft skills

COMMUNICATING CHANGE EFFECTIVELY TO STAKEHOLDERS

SUMMARY

A communications management plan is where we define and describe how, when, and by whom information about the project will be administered and disseminated.

As the sound engineer said, “It’s all feedback. Some feedback is fun to hear, and some feedback isn’t, but all of it is needed to dial in on our goal”

PROVIDING TRAINING AND SUPPORT TO EMPLOYEES DURING THE TRANSITION

**WHY IS TRAINING IMPORTANT FOR A SUCCESSFUL
CHANGE MANAGEMENT PROCESS?**

- **YOUR PART**

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What is training important for a successful change management process?

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PROVIDING TRAINING AND SUPPORT TO EMPLOYEES DURING THE TRANSITION

WHY IS TRAINING IMPORTANT FOR A SUCCESSFUL CHANGE MANAGEMENT PROCESS?

- SMOOTH TRANSITION
- REDUCED RESISTANCE
- INCREASED PRODUCTIVITY
- BOOSTED CONFIDENCE
- CONSISTENT IMPLEMENTATION
- ADDRESSING ANXIETY
- ONGOING SUPPORT

PROVIDING TRAINING AND SUPPORT TO EMPLOYEES DURING THE TRANSITION

SMOOTH TRANSITION: When employees encounter changes, whether it's new technology, revised processes, or organizational restructuring, they need guidance. Proper training ensures a smoother transition. It helps them understand the “why” behind the changes and equips them with the necessary skills.

PROVIDING TRAINING AND SUPPORT TO EMPLOYEES DURING THE TRANSITION

REDUCED RESISTANCE: Change often triggers resistance. By offering training and support, you address employees' concerns and build their confidence. When people feel prepared, they are more likely to embrace the changes rather than resist them.

PROVIDING TRAINING AND SUPPORT TO EMPLOYEES DURING THE TRANSITION

INCREASED PRODUCTIVITY: Well-trained employees are more productive. They can adapt faster to new tools, systems, or workflows. Training ensures they know how to perform their tasks efficiently in the new environment.

PROVIDING TRAINING AND SUPPORT TO EMPLOYEES DURING THE TRANSITION

BOOSTED CONFIDENCE: Imagine navigating a complex system without proper training—it can be daunting. Providing support and training boosts employees' confidence. They feel capable and empowered to handle their responsibilities effectively.

PROVIDING TRAINING AND SUPPORT TO EMPLOYEES DURING THE TRANSITION

CONSISTENT IMPLEMENTATION: Training ensures that everyone follows the same procedures. Consistency is essential for successful change. When employees receive uniform training, they contribute to a cohesive organizational culture.


PROVIDING TRAINING AND SUPPORT TO EMPLOYEES DURING THE TRANSITION

ADDRESSING ANXIETY: Change can create anxiety. Training sessions provide a safe space for employees to ask questions, clarify doubts, and express concerns. It fosters a positive environment during transitions.



PROVIDING TRAINING AND SUPPORT TO EMPLOYEES DURING THE TRANSITION

ONGOING SUPPORT: Transition doesn't end with the initial change. Ongoing support—whether through workshops, documentation, or mentorship—ensures that employees continue to adapt and thrive.



PROVIDING TRAINING AND SUPPORT TO EMPLOYEES DURING THE TRANSITION

IN SUMMARY:

Investing in time and budget in training and support pays off by easing transitions, reducing resistance, and empowering employees to embrace change effectively.

NAVIGATING TECHNOLOGY CHANGES, INCLUDING SYSTEM UPGRADES AND DIGITAL TRANSFORMATIONS

ELEMENTS OF TECH CHANGE MANAGEMENT

- Embracing Technology Change
- Organizational Agility
- Current State/Future State
- Training and Support
- Tech Change Management Outcomes

NAVIGATING TECHNOLOGY CHANGES, INCLUDING SYSTEM UPGRADES AND DIGITAL TRANSFORMATIONS

EMBRACING TECHNOLOGY CHANGE

- In today's dynamic business landscape, technological change is no longer optional—it's essential for thriving in the digital age.
- Strategic adoption of technology enhances operational efficiency, drives innovation, and improves customer experiences.

“DIGITAL TRANSFORMATION IS LESS ABOUT DIGITAL AND MORE ABOUT PEOPLE, CULTURE, AND NEW LEADERSHIP TO CREATE BUSINESS VALUE IN A POST-INDUSTRIAL MARKET” - BRIAN SOLIS

NAVIGATING TECHNOLOGY CHANGES, INCLUDING SYSTEM UPGRADES AND DIGITAL TRANSFORMATIONS

ORGANIZATIONAL AGILITY

- Agility and adaptability are key. Organizations must respond swiftly to technological shifts.
- **AGILE APPROACH:** Organizations should be nimble, adjusting processes and strategies as needed.
- **ADAPTIVE MINDSET:** Leaders and teams must embrace change, viewing it as an opportunity rather than a threat.

NAVIGATING TECHNOLOGY CHANGES, INCLUDING SYSTEM UPGRADES AND DIGITAL TRANSFORMATIONS


CURRENT STATE

- **FOUNDATIONAL STEP:** BEFORE PLANNING ANY CHANGE, UNDERSTAND THE CURRENT STATE THOROUGHLY.
- **WHY IT MATTERS:**
 - Sets the context for change.
 - Helps design, communicate, and implement new ways of thinking and working.
 - Enables positive alignment amid uncertainties.
- **COMPONENTS TO ASSESS:**
 - Strategic priorities.
 - Organizational structures.
 - Cultural norms.
 - Processes and systems.
 - Stakeholder needs and concerns



NAVIGATING TECHNOLOGY CHANGES, INCLUDING SYSTEM UPGRADES AND DIGITAL TRANSFORMATIONS

DESIRED FUTURE STATE

- Define where you want to be.
 - Identify the gap between current and future states.
 - Determine the necessary changes to bridge that gap
- 

NAVIGATING TECHNOLOGY CHANGES, INCLUDING SYSTEM UPGRADES AND DIGITAL TRANSFORMATIONS

TRAINING AND SUPPORT

- **CRITICAL FOR SUCCESSFUL TRANSITIONS:**
 - Training equips employees with skills for new technologies.
 - Support minimizes resistance and boosts confidence.
- **BENEFITS:**
 - Improved performance and efficiency.
 - Preparation for higher responsibilities.
 - Demonstrates employee value.
 - Tests new performance management systems

NAVIGATING TECHNOLOGY CHANGES, INCLUDING SYSTEM UPGRADES AND DIGITAL TRANSFORMATIONS

TECH CHANGE MANAGEMENT OUTCOMES

- **SMOOTH TRANSITION:**
 - Careful planning, communication, and feedback.
 - Employees feel supported and engaged.
- **MAXIMIZING TRANSFORMATION BENEFITS:**
 - Change management ensures radical transformations occur with minimal discomfort

MONITORING AND EVALUATING THE RESULTS OF THE CHANGE

1. WHAT WAS PLANNED?

Review the intent of the project / change

2. WHAT ACTUALLY HAPPENED?

Establish the facts

3. WHY DID IT HAPPEN?

Analysis of cause and effect, Avoid placing blame

4. WHAT ARE WE GOING TO DO NEXT TIME?

Correct weaknesses and sustain strengths. Focus on items you can fix, rather than external forces outside of your control.

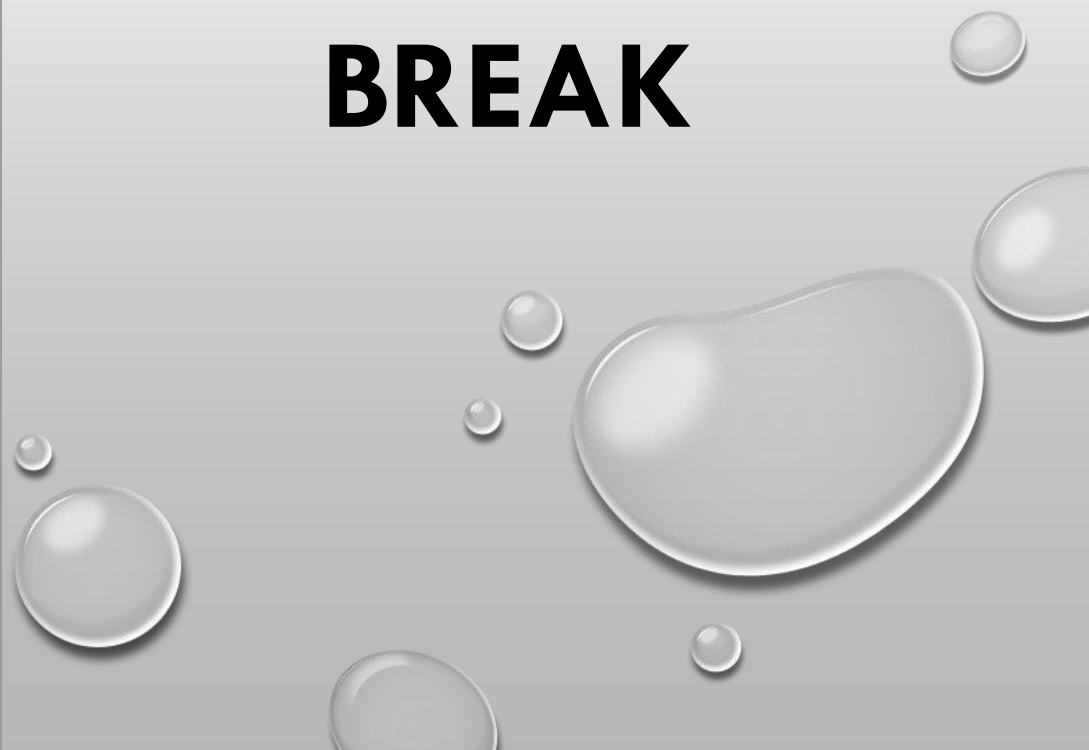
Everyone has a voice and a chance to speak.

Stay open to feedback.

Take notes and follow up.



SHORT BREAK



WORKSHOP: THE 15-MINUTE PRIORITY MATRIX

Start with a known problem.

Something for which you have already completed a 5 Why, or a Fishbone, or a Cause Effect Matrix. We start at Root Cause

1. Everyone gets a post-it pad. In silence brainstorm ideas to impact problem.
2. Facilitator goes around the table and consolidates into strings of related notes.
3. Rank, as a group, by effectiveness.
4. Plot on a 3x3 grid of cost and time.
5. Multiply Cost x Time x Effectiveness for a number from 1 to 27: Take a picture of the grid.
6. Make a ranked log of all the ideas. Work from the top down. Take a picture of the action list.
7. Go to bat for your team.

WORKSHOP: THE 15-MINUTE PRIORITY MATRIX

2-3 minutes Everyone gets post-its: silent brainstorming

One idea per note

No bad ideas

No constraints – dream the dream!



WORKSHOP: THE 15-MINUTE PRIORITY MATRIX

3-4 minute

Facilitator starts with someone and asks for an idea.

Facilitator asks who else had the same idea and makes stacks.

This puts everyone on the same team.

Groupings are put on board.

Repeat till there are no more post its



WORKSHOP: THE 15-MINUTE PRIORITY MATRIX

2-3 minute

Rank each idea by likely effectiveness: Time and money do not matter yet



- 1) Least likely, some hesitation
- 2) Pretty likely, lot of agreement
- 3) Dead ringer, it couldn't fail

Be willing to have a brief discussion about why.












You must agree on a **WHOLE** number

WORKSHOP: THE 15-MINUTE PRIORITY MATRIX

1-2 minute










Plot them on the Chart: You must agree on a square.

	Months	Weeks	Days
Low Cost	3 	6 	9  
Med Cost	2 	4 	6 
High Cost	1 	2 	3 

WORKSHOP: THE 15-MINUTE PRIORITY MATRIX

2-3 minute

Multiply, and move them to a final ranked list.

	Months	Weeks	Days
Low Cost	3 	6 	9  
Med Cost	2 	4 	6 
High Cost	1 	2	3 

Cost	Time	Effectiveness	Total	Action item
3	3	2	18	Item #1
2	3	3	18	Item #2
3	2	2	12	Item #3
2	2	3	12	Item #4

BREAKOUT GROUPS:

THE 15-MINUTE PRIORITY MATRIX

1. OFFICE TEMPERATURE CONTROL: AS THE BUSINESS GREW, SO DID THE BUILDING. THE AC DID NOT GROW, AND IS NO LONGER KEEPING UP. IT'S A BIG JOB, AND THE CONTRACTORS ARE UNABLE TO GET STARTED UNTIL LATE AUGUST 23RD.
2. OFFICE SUPPLIES MANAGEMENT: THE FRONT DESK IS OVERWHELMED WITH THE FRUSTRATION OF MANAGING AND RESTOCKING ESSENTIAL OFFICE SUPPLIES SUCH AS PRINTER PAPER, INK CARTRIDGES, PENS, AND STATIONERY. ADDITIONALLY, THE SUPPLY CLOSET IS A DISORGANIZED MESS FROM PEOPLE DIGGING THROUGH IT.
3. CONFLICTING DATA FOR REPORTS: DIFFERENT DEPARTMENTS HAVE DIFFERENT SOURCES FOR DATA, AND THEY SEEM TO OFTEN TELL CONFLICTING STORIES.
4. MEETING ROOM AVAILABILITY: LIMITED MEETING ROOM AVAILABILITY AND SCHEDULING CONFLICTS ARE DISRUPTING PLANNED MEETINGS MAKING IT HARD TO COLLABORATE.
5. NOISE DISTURBANCES: LOUD COWORKERS, MANUFACTURING EQUIPMENT ON THE OTHER SIDE OF THE WALL, AND CONSTRUCTION ACROSS THE STREET ARE ALL MAKING IT HARD TO WORK IN THE SMALL OFFICE ENVIRONMENT.
6. OFFICE CLEANLINESS AND MAINTENANCE: MAINTAINING A CLEAN AND WELL-MAINTAINED OFFICE ENVIRONMENT IS ESSENTIAL FOR EMPLOYEE HEALTH, SAFETY, AND MORALE. HOWEVER, SOME INDIVIDUALS AGREE WITH THIS MORE THAN, OTHERS. PETER'S CUBICLE WALL SEEMS TO BE SPILLING OUT INTO THE AISLE.