

# **Navigating Change: The Vital Role of HR in Change Management**

**Presented by Michelle Coussens, Business Strategist, Plan B Consulting**

# Meet the Expert

Michelle Coussens | Business Strategist | Plan B Consulting



*Michelle Coussens is a frequently sought-after speaker and business strategist for numerous types of organizations on a wide range of topics related to the workplace, including but not limited to talent management, business strategy, and operational effectiveness.*



*She is a resourceful, resilient, and relentless business professional with demonstrated success in building new programs, driving short-term efficiencies, and improving long-term effectiveness all through innovation, rigor, and courageous leadership.*



*She has direct experience with a variety of industries, as well as in consulting, education, and not-for-profit organizations. With consistently high participant ratings, her webinars, seminars, and speaking engagements bring practical value to businesses of every size and type.*

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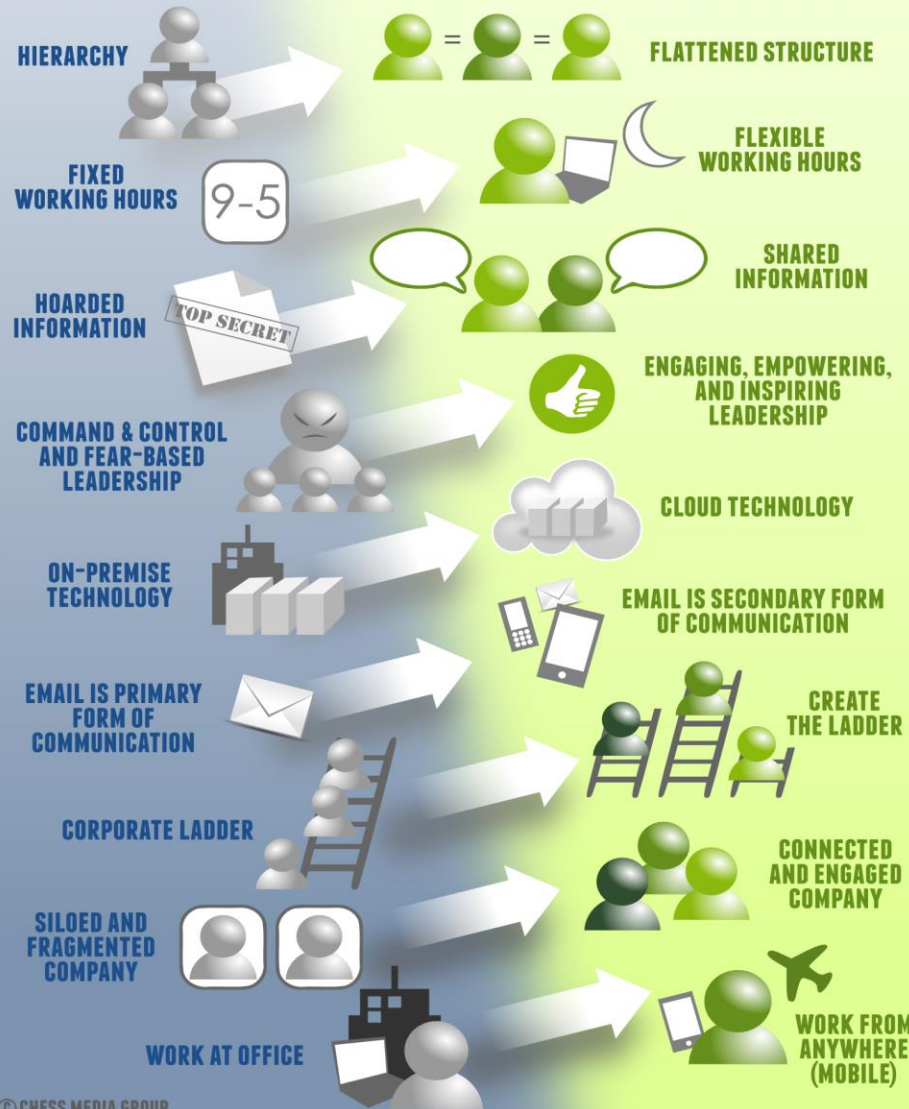
# Agenda

- Assist leadership in driving change communication, implementation, and tracking
- Prepare user-friendly answers to address workers' questions and concerns
- Spot necessary training needs and implement effective training programs
- Encourage buy-in from various stakeholders across the organization
- Identify and update roles and responsibilities to align with the changes



# THE EVOLUTION OF WORK

THE PAST → THE FUTURE

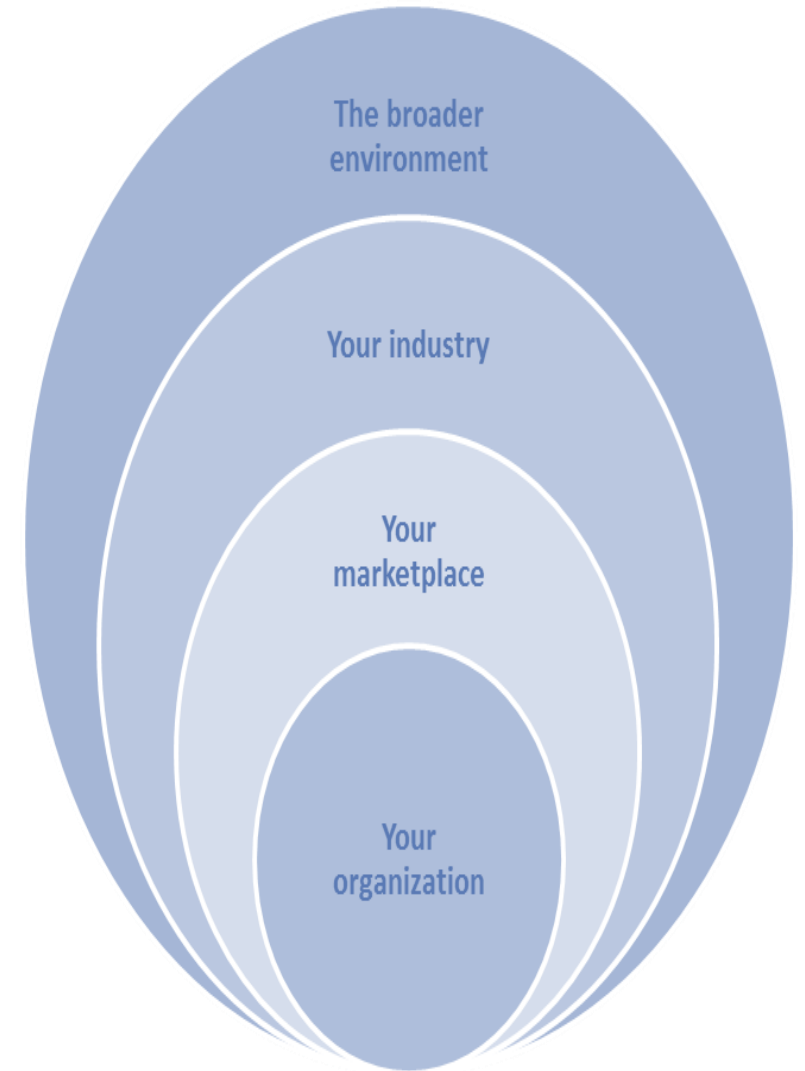


## Workplace history

- 1) Pre-industrial/Pre-bureaucratic: small businesses; 1 leader
- 2) Growth & also emergence of hierarchy/bureaucracy
  - Need rules and SOPs
- 3) World instability, global competition, Japanese influence
  - Teams, downsizing, reengineering, QA, & empowerment
- 4) Digital, mobile, social-media age requiring agile capability
  - Relationships and networks
  - Influence instead of command and control
  - More and more work done in teams
  - More fluid work environments

# Business trends

- 1) Integration of Strategy and Technology
- 2) Innovation Affecting All Aspects of Business
- 3) Translation of Data and Knowledge into New Products/Services
- 4) Transformative Effects of Customer Influence, Information & Access
- 5) Faster and Faster Pace of Change and Disruption
- 6) Increased Value of Human Capital as an Asset
- 7) Blurring of Lines Between and Within Organizations
- 8) Shift from Employee to Free Agent
- 9) New Leadership Definitions and Expectations
- 10) Shift of Environmentalism from Social to Business Cause







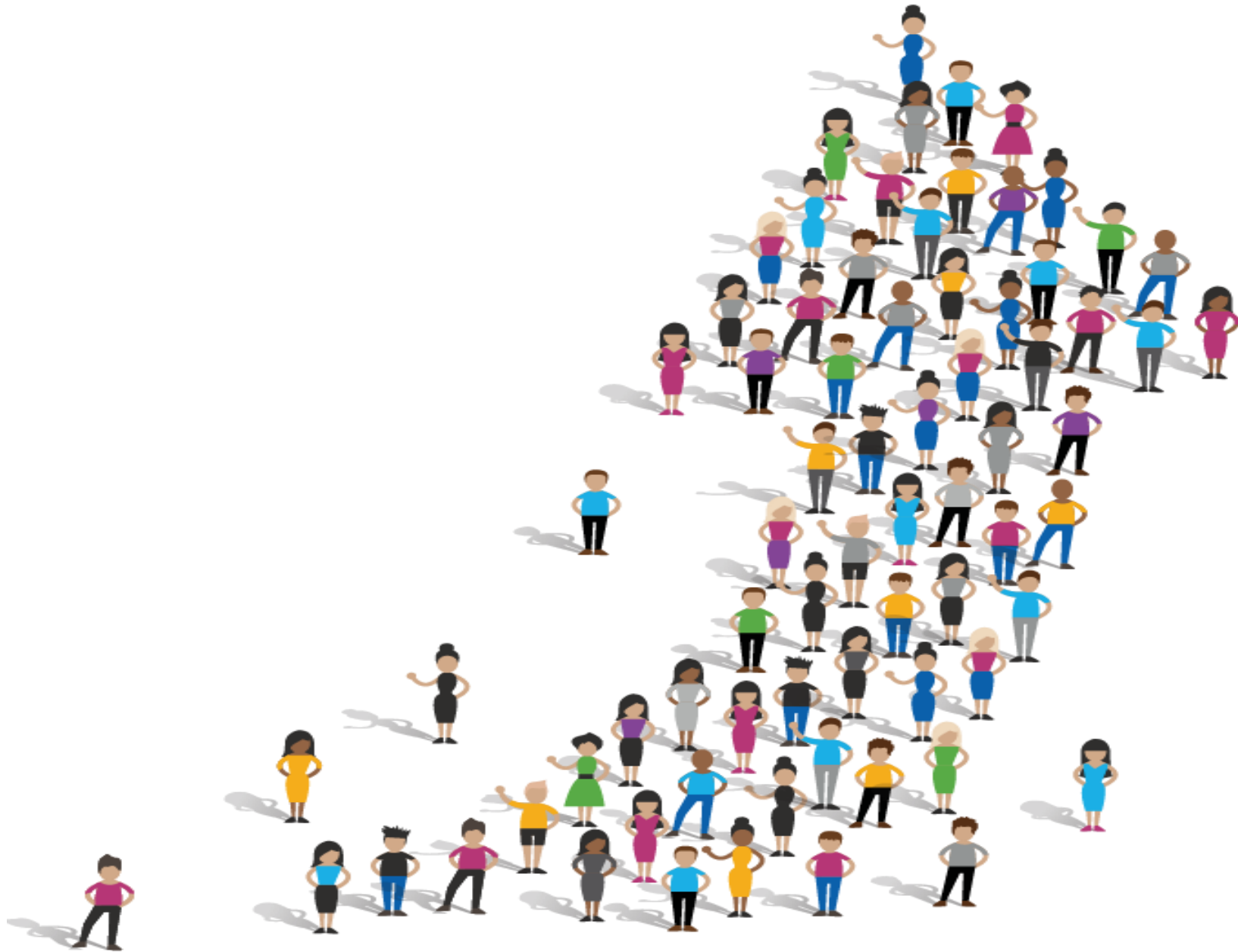
## Emerging concerns

- More global, interconnected competition
- Economic uncertainty
- Environmental/climate concerns
- Increased customer expectations
- Accelerated technological change
- More “first time” business disruptions
  - Hacking and sabotage
  - Supply chain complications
  - Pandemics (Coronavirus)
    - And continuing aftermath effects

# Future job trends

- **85% of 2030 jobs may not exist yet**
  - Continued automation of administrative tasks, along with skill shortages
  - Influence and effects of robotics, 3-D printing, virtual reality, autonomous vehicles
  - As automation increases, employee soft skills increase in relative need and importance.
    - Emotional intelligence, conflict resolution, public speaking, leadership, empathy, ethics, etc.
- **Increase in a blended workforce that includes atypical work, remote work, and gig work**
  - Over 80% of large corporations are expected to increase their flexible workforce in the future.\*
- **New models of artificial intelligence and thinking**
- **Contextual learning to upskill, instill agility, and enhance internal mobility**
  - Flatten organizations with dynamic roles
  - Encore careers

# Preparing for Change: Ensuring a Smooth Transition





# Change is our only constant

- **No organization is exempt from change**
- **70% of change initiatives fail (McKinsey)**
  - Bad management, poor implementation, bad luck, etc.
- **Successful change starts with planning for the future**
  - Understand your organization's plans, as well as how they link to day-to-day activities
  - Map how current activities may need to change, as well as what new activities need to take place
  - Consider how roles and responsibilities will change
  - Assist managers and employees with transition

# Identifying the need and the “why” behind the change

Long-term Goals

Operational Objectives

Projects/Initiatives

WorkPlans & Budgets

- **Understand associated history and plans for the future**
  - Strategic plans
    - Long-term goals
  - Business/operational plans
    - Objectives, initiatives and projects
- **Vision:**
  - Picture of desired future
  - Where you want to go/be
  - Should be inspiring, energizing, and aligning
- **Mission (purpose) —Why you exist/what business you are in**
- **Goals—over-arching; what will get you there**
- **Objectives— S.M.A.R.T sub-goals**
- **Activities—How you will go about doing it**
  - Tactics—Who will do what and by when
  - Roles—Ownership of tasks
- **Relationships—Who will be involved and affected**



# Organizational cohesion provides needed commitment for change

- **How widely and deeply employees hold the company's dominant values**
  - Do most employees understand/embrace your culture?
- **Organizational commitment**
  - Affective commitment: Emotional attachment to, identification with, and involvement in an organization
  - Results in lower turnover, higher motivation and higher likelihood to embrace change
- **Consider shared values**
  - Characteristics: easily understood; positive
  - Connects people to the organization and to each other
  - Consistent with the organization's mission, vision, values, and goals
- **Value congruence: Similarity of a person's values hierarchy to the organization's**

# Communicate with employees in advance, as well as during and after the change

ORGANIZATIONAL CHANGE MANAGEMENT COMMUNICATION PLAN					
AUDIENCE	WHAT NEEDS TO BE COMMUNICATED	DESCRIPTION OF CONTENT	WHO IS RESPONSIBLE FOR GENERATION	TYPE OR FORMAT OF COMMUNICATION	FREQUENCY

# Identify and engage stakeholders before and during change

- **Identify stakeholders**
  - Those who impact you and/or you impact
  - Internal & external
- **Assess their roles**
  - Consider participation, needs, importance, and control
  - Understand how any changes will affect them, as well as how they can affect transitions
  - Different stakeholders provide different concerns and value
- **How?**
  - Meetings, conference calls, surveys, focus groups, brainstorming sessions, etc.



*"No, Thursday's out. How about never—is never good for you?"*



# Develop an effective change management plan

## Follow John Kotter's 8-Step Model

Step 1: Light a fire for change

Step 2: Get the right people on board

Step 3: Paint a compelling picture

Step 4: Communicate (before, during, and after)

Step 5: Remove obstacles and empower people to take action

Step 6: Achieve and celebrate quick wins early

Step 7: Don't only focus on immediate wins

Step 8: Find ways to make the changes stick

**Learn more at:**

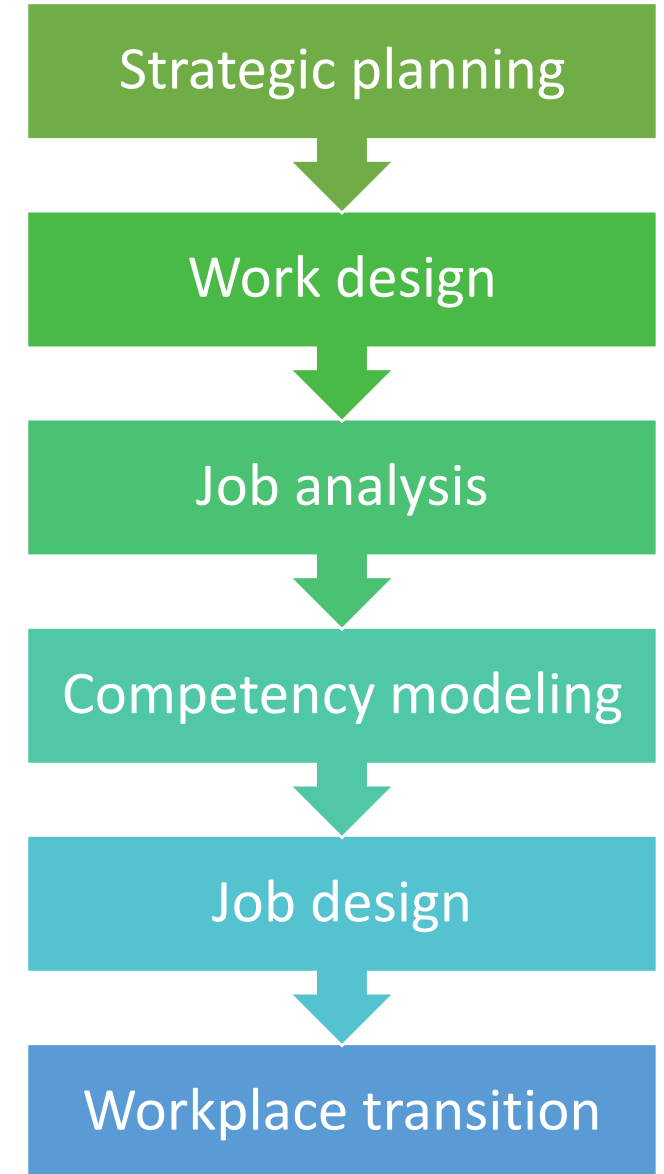
<https://www.kotterinc.com/methodology/8-steps/>

# Conducting insightful impact assessments

- Clearly define the nature and scope of the change
- Determine who will be affected by the change
- Identify stakeholders and analyze their roles, responsibilities, expectations, and concerns
- Identify the various aspects that might be impacted by the change
- Develop criteria to assess the impact on each category
- Assess the current state of the organization, process, or system in each impact category
- Envision the future state after the change has been implemented
- Evaluate the gap between the current and future states for each impact category
- Identify potential risks and obstacles associated with the change
- Identify potential opportunities that the change might bring
- Develop strategies to mitigate the negative impacts and risks
- Develop a communication plan to inform stakeholders about the upcoming change
- Identify the training needs of those affected by the change
- Establish mechanisms to monitor the progress of the change implementation, including collecting feedback
- Document the entire change impact assessment process, including findings, analyses, strategies, and outcomes

# Map and realign roles & responsibilities

- **Identify work needs and types of workers**
  - Work Design--which activities should be grouped together
  - Conduct Job Analysis-- comparison of current and future needs
  - Model Competencies needed-- characteristics and capabilities
  - Design individual roles-- which tasks should be grouped together in one job
- **Enact transition through incremental changes**
  - Identify and connect talent pools with IDPs (Individual Development Plans)
  - Use evidence-based performance, developmental, and succession planning data
  - Expect to lose unqualified workers



# HR's Role in Managing Change & Handling Resistance



# Assist in managing transition

- **Select change agents who can influence others**
  - Create a vision of desired shift and results
  - Communicate and role model the vision effectively
- **Create an urgency for change– even if the organization is already doing well**
  - Inform employees about driving forces
  - Highlight the business and personal consequences of inaction
  - Focus on carrots versus sticks
  - Break large changes down into small steps and timeframes that are more palatable
- **Guide others to alleviate anxiety and clarify roles and expectations**
- **Acknowledge concerns/feelings**
- **Role model the behavior**
  - Champion a compelling future with a spirit of possibility
  - Encourage employee experimentation without punitive repercussions
  - Identify critical success factors and evaluate and reward progress



# Providing training and support to employees

*All changes call for some form of training to support transition.*

- Consider the type of training needed
- Who should receive the training?
- What will the training achieve?
- How will the training be done?
- Will the training require any tools or equipment?
- Who will be responsible for the training?
- How long will the training take?
- How much will the training cost?

# Help people adapt to change

- **Share personal experiences involving change**
- **Provide a history of the anticipated change and the present situation**
- **Provide reasons for any changes and the benefits of the change for the individual and organization**
- **Help people see the potential impact of the change**
- **Listen carefully to their questions and concerns**
- **Tell people what will not be changed**
- **Acknowledge the pros and cons associated with the change**
- **Agree what resources and strategies will be needed for change**
- **Celebrate by confirming the partnership for the change**
  - Acknowledge and thank individuals for their cooperation and contributes to the change

# Persuade others to commit to change

- **Determine and leverage your power sources**
  - Power = potential ability of one person to influence others to carry out orders or do something they otherwise would not have done
    - Hard Power, Legitimate power, Reward power, Coercive power, Soft Power, Expert power, Referent power
  - Responses to power: compliance, resistance or commitment
    - Assess others' needs, wants, and styles
      - Also understand what you truly need (versus want) and what you have to offer them
    - Apply social capital and reciprocity
      - Get commitment rather than mere compliance
- **Address resistance to change**
- **Types of resistance**
  - Aggressive
  - Passive
  - Passive-aggressive
- **Countering resistance to change**
  - Playing devil's advocate
  - Taking small steps
- **Reasons for resistance**
  - Employees vs. managers
  - Others

# Reduce resisting factors

- Participation in determining needed changes
- Communication and transparent access to information
- Training & development
- Provision of adequate tools
- Negotiation
- Stress management assistance
- Validation and addressing of their fears

***Coercion is a very last resort and often doesn't work.***

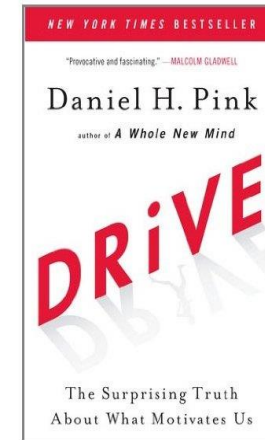


“What if we don’t change at all ...  
and something magical just happens?”

<https://images.app.goo.gl/fbrQZG6BfGKQD3xF9>

# Dealing with employees who won't change

- First, feel and show empathy
- Ensure you are eliminating barriers to success
- Be firm, highlighting the impact to the business and their career potential
- Assist managers in updating performance expectations
- Align daily work incentives with long-term goals
  - *Dan Pink's insights*
    - Motivation 1.0: Work to survive
      - “Have” to do
      - Stay in business
    - Motivation 2.0: Seek reward; avoid punishment
      - “Could” do
      - Focus on profit maximization
    - Motivation 3.0: Intrinsic motivators (values)
      - “Want” to do
      - Profit as a catalyst, not an objective





# Identifying and filling gaps in skills or resources

- **Identify traits of adaptable workers in your recruiting and hiring processes**
  - Ensure technological ability and disposition
- **Create and support agile teams**
- **Drive continuous improvement by quickly responding to changing trends, innovation, destabilization, and industry shifts**
- **Encourage calculated risk-taking**
- **Guide an employee's curiosity toward innovative productivity**
- **Build and maintain trust, rapport and authenticity**
- **Foster open-minded discussions**
- **Counter unproductive behavior**
- **Employ techniques to resolve emerging issues**

# Post-Change Evaluation: What Worked & What Didn't



# How to monitor the change progress

- **Create sound transition plans with objectives for each task, including:**
  - Desired results and time to achieve
  - People collaborating with or relying on
  - Identification of other resources needed
  - Ways to mitigate risks
- **Identify leading and lagging indicators to avoid derailment, plus:**
  - Milestones—periodic for achievement
  - Stage Gates—go/no-go decision points
- **What to avoid**
  - Metrics for which you cannot collect accurate or complete data
  - Metrics that may in theory measure the right thing but cause unintended behavior
  - Metrics that are too costly to track, difficult to explain, or unnecessary

Task	Owner	Priority H/M/L	Target Start Date	Target Finish Date	Actual Start Date	Actual Finish Date	Contingencies & Dependencies	Status: Green Yellow Red	Status Comments

# Assess organizational health during change

- **Is the organization performing at its highest potential? How do you know?**
- **Increasing use of Organizational Network Analysis (ONA)**
  - How do communications, information, and decisions flow through an organization?
  - Like taking an x-ray of the organization's inner workings
    - Involves People Analytics, including diversity and inclusion, innovation, as well as employee performance and motivation
    - Understanding relational dynamics driving employee sentiment and thus behavior
- **Some sample metrics to monitor during change:**
  - Improvement in performance and execution
    - Project plan progress against targets
    - Various KPI measurements around time, quality, quantity, and financial metrics
  - Personnel-related same metrics
    - Turnover by employee type, department, etc.
    - Time to fill needed jobs
    - Gaps between current and required skills
    - Number of below-average performers in critical jobs

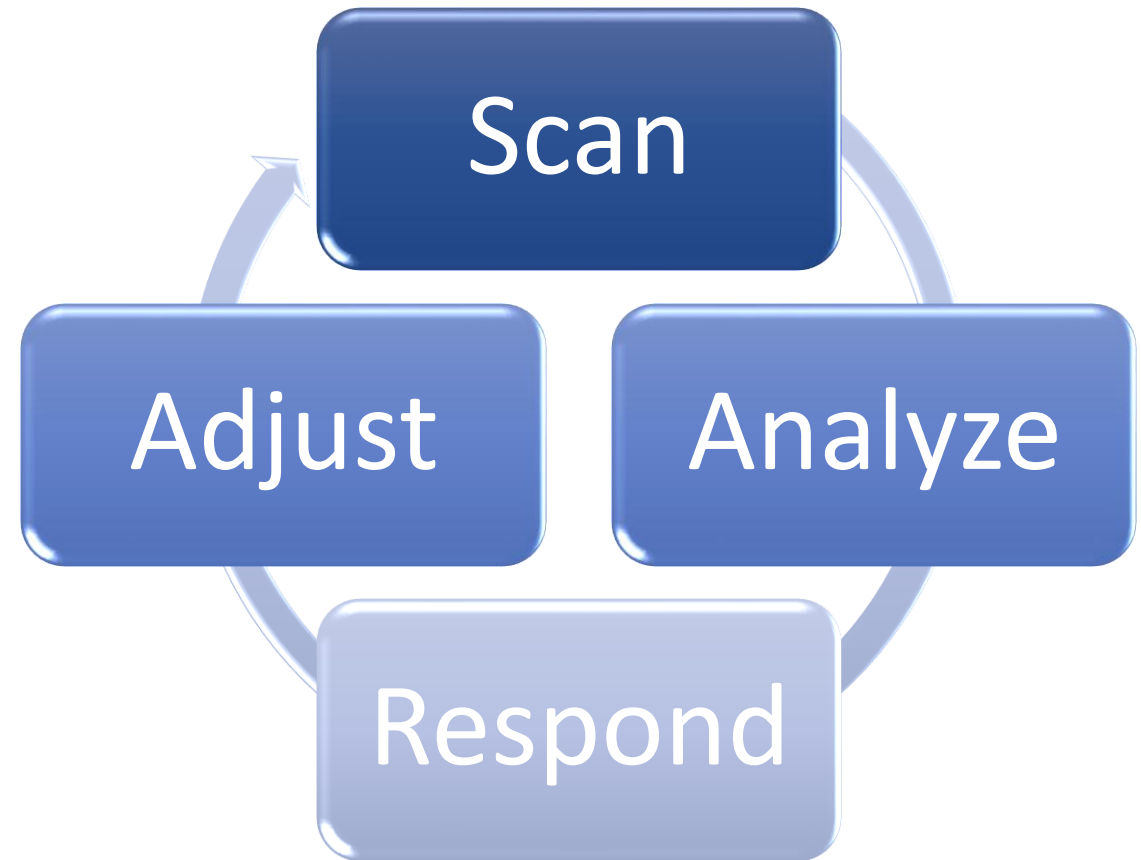
# Gather feedback from employees

- Ensure that the changes made are well-defined and communicated to all employees
- Choose feedback methods that suit the nature of the changes and the size of your organization, such as surveys, focus groups, one-on-one interviews, suggestion boxes, and regular team meetings
- Assure employees that their feedback will remain anonymous and confidential to encourage honest responses
- Organize and analyze the collected data, looking for common themes, patterns, and outliers
- Based on the analysis, identify key findings and trends on what is working well and not so well
- Prioritize the insights that have the most significant impact on the changes and the organization as a whole
- Communicate the feedback results to employees and stakeholders, being transparent about what was learned, what actions are being taken based on the feedback, and the timeline for implementing adjustments
- Continue to monitor impact, gathering feedback periodically to assess whether the adjustments have been effective



# Identify areas for additional enhancement or improvement

- **Incorporate an agile approach**
  - Scan for early warning of emerging trends
  - Analyze information to lead to decisions and solutions
  - Respond to emerging opportunities and risks
  - Adjust starting roadmap
  - Continue scanning, analyzing, responding, and adjusting iteratively



## Some additional resources

- <https://www.shrm.org/LearningAndCareer/learning/PublishingImages/Pages/Forms/AllItems/Sample%20Change%20Management%20Effectiveness%20Survey.pdf>
- <https://www.mckinsey.com/industries/retail/our-insights/the-how-of-transformation>
- <https://www.youtube.com/watch?v=3n-c6iAKFgg>

## Today's takeaways

- Better navigate change successfully and increase the chances of a successful transformation
- Guide your organization and employees through both the challenges and opportunities that come with change



**Please  
submit your  
questions  
in the chat  
box.**



Q U E S T I O N S   &   A N S W E R S

# Let's stay in touch!

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