**Change Management Tools**

Change management is a process with intentionally planned activities to assist stakeholders in understanding, embracing and implementing change

**WHY**

Change is hard, for all stakeholders. Change will not be accomplished without effort. However, change will occur more smoothly if a proven change management process is used early and sustained throughout the project period.

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| **Change Management Principles**  People will change if they:   * Understand why it is important * Know exactly how it will affect them * Have their concerns heard and addressed * Are provided timely and effective communication about the change * Are given specific, prescriptive guidance about what they need to do differently * Have their efforts recognized |

**WHEN**

Throughout the life of the project, beginning before the project launches when it is critical to engage all stakeholders

**HOW TO**

Change Management requires attention to three components, symbolized by the following terms: The rider, the elephant, and the path\*. The *rider* refers to a person’s rational mind, while the *elephant* is a symbol for a person’s emotional mind, and the *path* is the environment in which the change occurs.

**How to Change Things When Change is Hard**

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| --- | --- | --- |
| DIRECT the Rider  CLARITY | MOTIVATE the Elephant  DESIRE | SHAPE the Path  EASE |
| Follow the Bright Spots Find what is working well and reproduce | **Find the Feeling** Appeal to the emotions | **Tweak the Environment** Modify the environment to make the change “easy” |
| Script the Critical Moves Give prescriptive direction needed to accomplish the change | **Shrink the Change** Make change stepwise, with achievable steps | **Build Habits**  Help the change to become “automatic” |
| Point to the Destination Give the “big picture”, describe the future state | **Grow Your People** Invest in your people – education, encouragement | **Rally the Herd** Engage the entire team & all stakeholders |

\*Adapted from the book, Switch: How to Change Things When Change Is Hard, by Chip and Dan Heath

The Change Management Plan will address the DESIRE component of change. The CLARITY and EASE components of Change Management will be addressed in other tools including Process Mapping – Future State, Lean, and Standard Work.

**Template:**

* Change Management Plan

**Related Tools:**

* Stakeholder Analysis
* Communication Plan

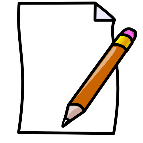
**Resources:**

Switch: How to Change Things When Change Is Hard, by Chip and Dan Heath (Book)

Heath Brothers Website - <http://heathbrothers.com>

* Switch Framework
* Switch for Organizations: The Workbook
* Switch in 16 Minutes (Video)

ADKAR: A Model for Change in Business, Government and Our Community, by Jeffrey M Hiatt (Book)

**Change Management Plan**

As a reminder, include the problem statement here:

Motivate the Elephant: Find the Feeling = DESIRE

1. The camera crew thought experiment.

As a team, engage in the camera crew though experiment.

*Imagine that, in making the case for change to your people, you weren’t allowed to speak to them directly. Instead, you had a camera crew at your disposal who would film anything you wanted them to film, and you could pick any 10 minutes of footage that they shot. What would be happening in that footage?*

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1. The pivotal testimonial.

As a team, discuss the following questions:

*Imagine that you can show your colleagues a video of one person talking, and the video has to persuade them that change is necessary. Who is the person? An employee who’s seen problems firsthand? A customer who’s sick and tired of the status quo? A competitor who is light-years ahead of you on something?*

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1. Build your own shrine. Can you make the need for change visual?

Given the Switch story of the “glove shrine”, as a team, brainstorm about how you could make the need for change VISUAL. Is there a “shrine” that you could build?

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**ACTION PLAN:**

Based on the above discussions, **what** will you do when you return to your organization to “Find the Feeling” for your stakeholders, team, and persons involved in the process? To engage people’s emotional side to change? By **who**? By **when**?

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