

Prosci change management webinar

Roles in change management

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About Prosci®

Our value proposition:

To help organizations build **their own internal change management competencies** through the development and delivery of tools and methodologies

Our principles:

Research-based | Holistic | Easy-to-use

Prosci by the numbers:

- 6 Longitudinal studies
- 12 Years of research
- 66% Fortune 500 companies
- 2000+ Research participants
- 4000+ Certified practitioners
- 45,000+ Registered members

About Prosci® webinars

Webinar purpose:

- Educational
- Thought provoking
- Insights into new development
- New ideas, phraseology, language, and frameworks
- **Give you at least one hour per week to think about change management**

Tools or downloads referenced in this free webinar are for webinar educational purposes; reproduction or distribution of these tools in your organization will require additional steps on your part.

Prosci's channels:

- Published products and tools
- Web-based tools and applications
- Face-to-face training
- Train-the-Trainer

Prosci's target audiences:

- Change management specialists
- Project teams and leaders
- Executives and senior leaders
- Managers and supervisors

Contact:

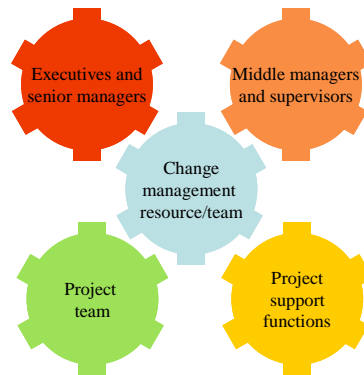
Telephone Support – 970-203-9332
Email Support – webinar@prosci.com
Webinars are presented by Tim Creasey, Prosci Chief Development Officer

Agenda

- Focus of change management
 - As the foundation of roles
- Change management roles
 - 5 roles

X

 - Why are they important
 - What do they do



Change management is:

the application of the set of tools, processes, skills and principles for managing the people side of change to achieve the required outcomes of the project or initiative

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Successful change addresses both the technical and the people side

Project management

Current Transition Future

Change management

Solution is designed, developed and delivered effectively (Technical side)

+

Solution is embraced, adopted and utilized effectively (People side)

= **SUCCESS**

Complementary disciplines with a common objective

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Change management focus is helping *individuals* make their own personal transition

Organizational
“The change” to how we do business

Individual

From: How I do my job today

To: How I will do my job after the change is implemented

Current Transition Future

Current Transition Future

Current Transition Future

Current Transition Future

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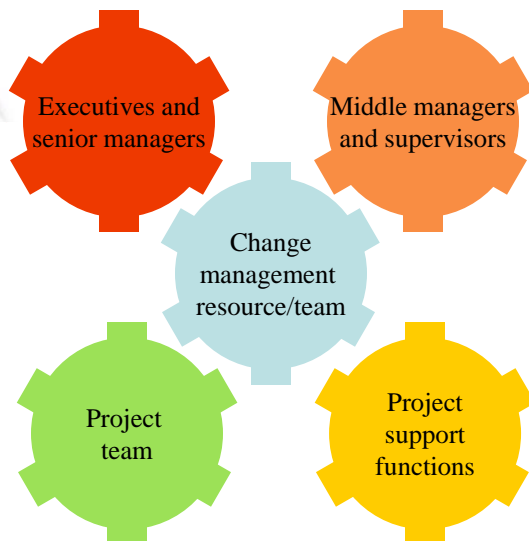
So, the “who” question remains:

- Who in the organization plays a role in employees:

- ✓ embracing...
- ✓ adopting... a change?
- ✓ utilizing...



Change management requires a system of ‘doers’



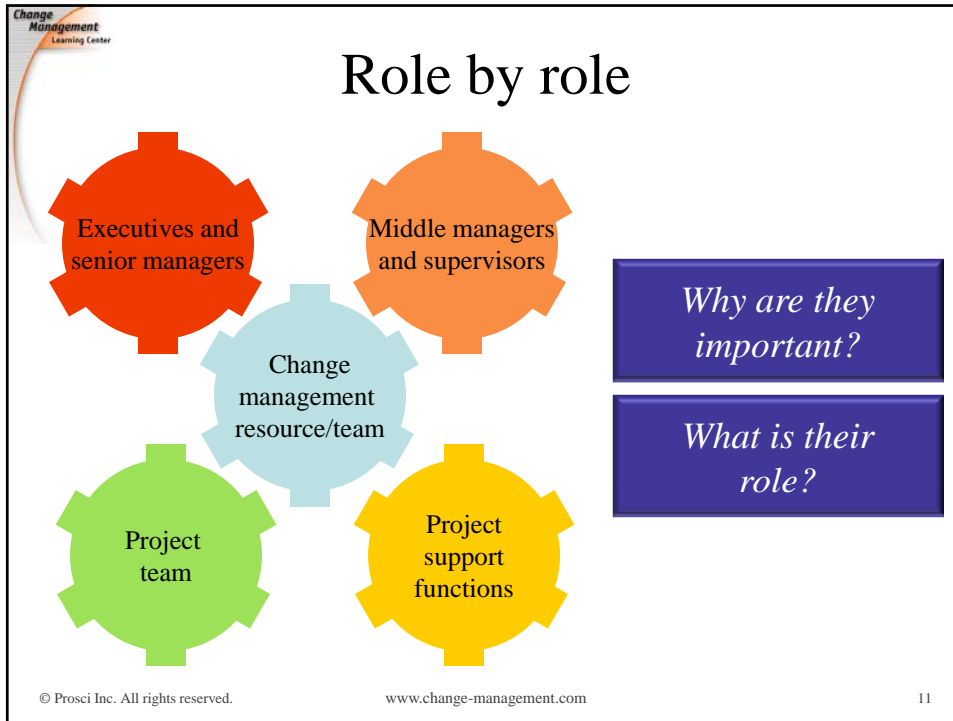
Each “gear” plays a specific role based on how they are related to organizational change

Change management cast of characters

Played by:	Their "line":
Change mgmt resource/team	"I develop the change management strategy and plans. I am an integral part of project success."
Executives and senior managers	"I launch (authorize and fund) changes." "I sponsor change."
Middle managers and front-line supervisors	"I coach my direct reports through the changes that impact their day-to-day work."
Project team	"I manage the technical side of the change. I integrate change management into my project plans."
Project support functions	"I support different activities of the change management team and project team."
* <i>Change management group, dept or office</i>	"We own the change management methodology and support its implementation in the organization."

The unfortunate reality

Played by:	Their "line":
Change mgmt resource/team	"I feel like I'm on an island here – people expect me to do everything and have all the answers."
Executives and senior managers	"I gave you funding and signed the charter – now go make it happen!"
Middle managers and front-line supervisors	"I feel like I'm the direct target for some of these changes, and I wish I knew what was going on."
Project team	"My focus is just the 'technical' side. Once I flip the switch, I'm moving on to the next project."
Project support functions	"I get called in on projects and given one little task, but I'm not sure how I fit in to the overall picture."
* <i>Change management group, dept or office</i>	"I don't even exist yet."



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Change mgmt resource/team

Why are they important

- For all the reasons change management is important:
 - The individual is the unit of change
 - Correlation to meeting objectives, staying on schedule and on budget
 - Costs/risks of mismanaging change
 - Anecdotal cases from your history
- Dedicated resources was #4 on list of success contributors in 2009 study

Without dedicated resources, it won't get done

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Change mgmt resource/team

What is their role

Phase 1 – Preparing for change

- Conduct readiness assessments
- Formulate strategy
- Evaluate sponsor coalition and team resource needs
- Identify unique risks, anticipated resistance and special tactics

Phase 2 – Managing change

- Create plans
 - Communication
 - Sponsorship
 - Coaching
 - Training
 - Resistance mgmt
- Integrate and implement change mgmt plans

Phase 3 – Reinforcing change

- Collect feedback
- Identify and fix problems
- Celebrate successes
- Transition

Apply a structured approach

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Change mgmt resource/team

What is their role

Enable others...

Help execs and senior leaders	Effectively fulfill the role of 'sponsor of change'
Help managers and supervisors	Effectively coach their employees through transitions
Help project teams	Make the bridge between implementing a solution and realizing benefits

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Executives and senior mgrs

Why are they important

- #1 on the greatest contributor to success list in 2009 benchmarking study...
 - And #1 in 2007 study
 - And in 2005, 2003, 2000 and 1998
- Employees want to hear and see their commitment to the change

Predictor of success or failure




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Executives and senior mgrs

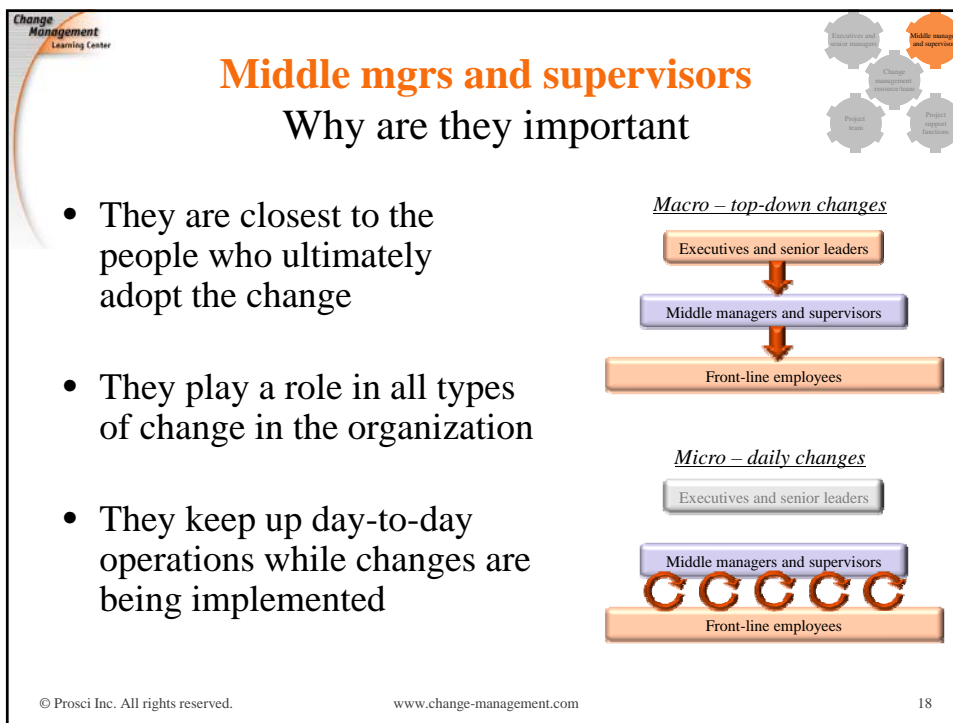
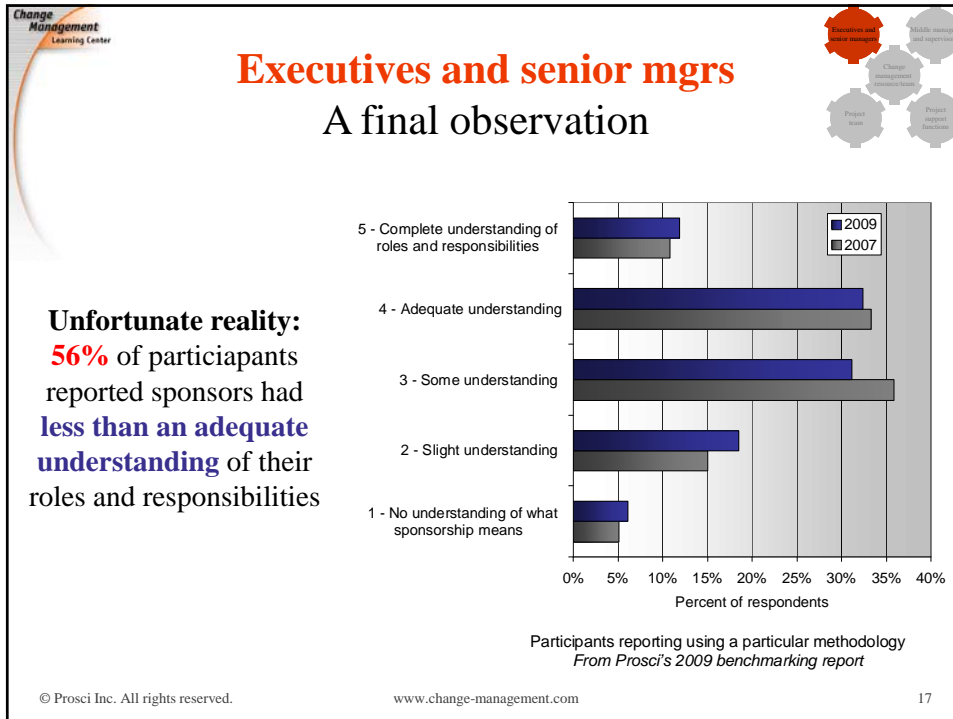
What is their role

1. Active and visible **participation** throughout the project
2. Build a **coalition** of sponsorship and manage resistance
3. Communicate **directly** with employees

Not just signing checks and charters!




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Middle mgrs and supervisors

What is their role



- Role 1 – Communicator
- Role 2 – Advocate
- Role 3 – Coach
- Role 4 – Liaison
- Role 5 – Resistance manager



Middle mgrs and supervisors

A final observation



- Middle managers and supervisors can be “caught the middle” in times of change

These groups are often both **recipients** and **agents** of change – this presents a unique change management challenge for you



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Project team
Why are they important

- Drive the technical side of change
 - Design solutions
 - Develop solutions
 - Deliver solutions
- Manage the tasks and activities for the technical side of the change

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Project team
What is their role

1. Design the actual change
2. Manage the ‘technical side’
 - Charter, business case, schedule, resources, work breakdown structure, budget, etc.
3. Engage with change management team/resource
4. Integrate change management plans into project plan


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Project support functions

- Examples
 - Human Resources (HR)
 - Organization Development (OD)
 - Training specialists
 - Communication specialists
 - SMEs
- Bring specific experience, knowledge, tools and expertise to the project
- Key pieces of the ‘technical’ and ‘people’ puzzles



Sometimes act as the change management resource


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The CMO

Change management group, department or office

- Emerging entity in some organizations



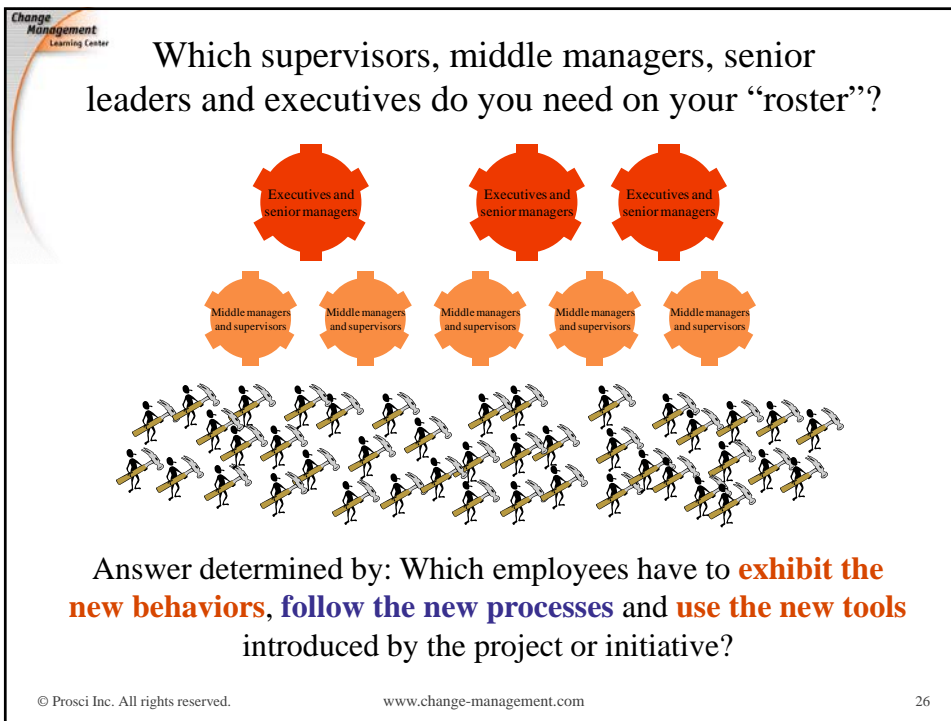
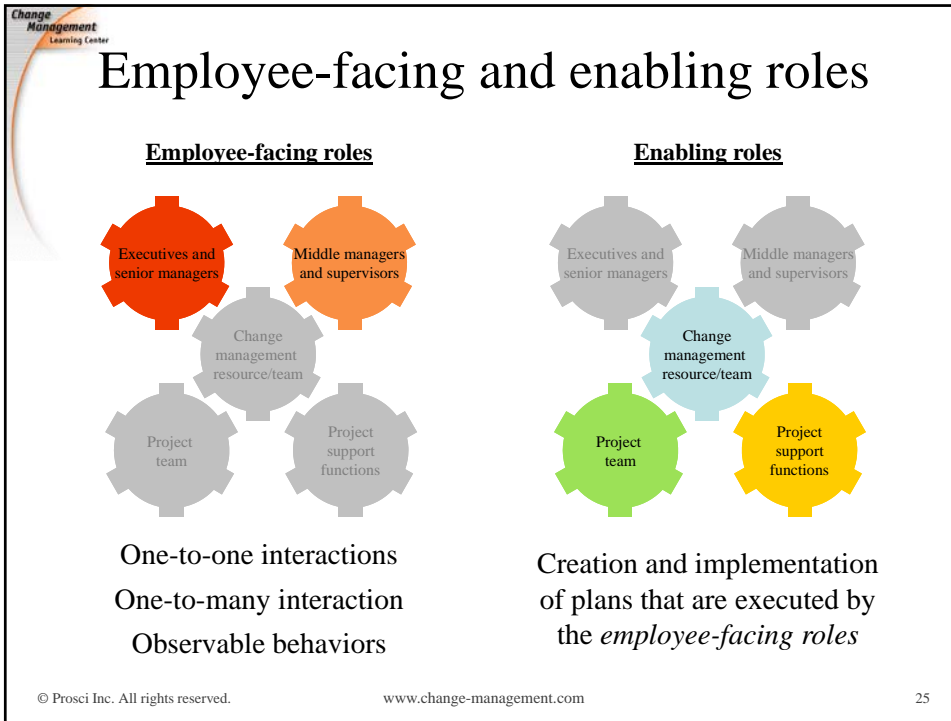
What it might do?

- Own and maintain the methodology
- Own and maintain the tools
- Own the curriculum
- Maintain a community
- Coach executives, sponsors, managers and supervisors
- Provide resources (people) on specific projects
- Provide consultative support to others applying change management

Where it might reside?

- Project Management Office (PMO)
- Human Resources (HR)
- Independent office
- Within the business
- Cross functional, multiple owners
- Strategy or planning group
- Organization Development (OD)

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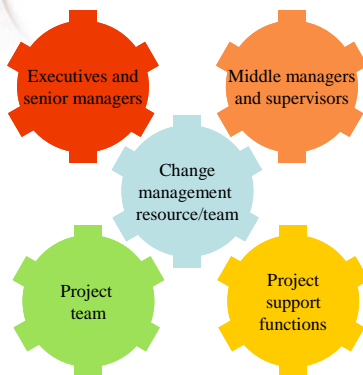


Change management takes change management

Applying Prosci's ADKAR® Model to the change “doing change management”

- A** Awareness of the need for *change management*
- D** Desire to participate and support *change management*
- K** Knowledge on how to apply *change management*
- A** Ability to apply *change management*
- R** Reinforcement to sustain *change management*

Each gear is experiencing a change when they begin applying change management



- How will you build:
 - Awareness?
 - Desire?
 - Knowledge?
 - Ability?
 - Reinforcement?

... for each gear ...

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Roles and responsibilities drive outcomes

All gears must be moving to drive successful change

Remember the objective:

- Employees embrace the change
- Employees adopt the change
- Employees utilize the change

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Next steps: Building competencies

Role	Responsibilities	Prosci resources
Change management resource/teams	Apply methodology on projects and initiatives Enable others	3-day certification program Toolkit Pilot Professional Benchmarking report
Executives and senior managers	Fulfill ABCs of effective sponsorship	4 to 6 hour sponsor program
Middle managers and supervisors	Fulfill 5 roles in support of direct reports	1-day coaching program Manager Toolkit
Project team	Integrate people side into technical side	3-day certification program Benchmarking report
Project support functions	Provide expertise, knowledge and tools	3-day certification program Benchmarking report
Impacted employees	Survive and thrive and take ownership of change	1-day employee program Survival Guide

Prosci's Train-the-Trainer Program

Site licenses

Enterprise Change Management


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Prosci change management offerings

Research-based | Holistic | Easy-to-use

Certification



3-day intensive program where you apply the methodology, process and tools to a real project as you learn them.

Earn CEUs, PDUs and HRCI credits


Open enrollment: offered at locations across the US, and also around the world by Primary Affiliates

At your location: for classes up to 12 participants


"Awesome - truly one of the most beneficial programs I have ever attended - immediate application on the job!"

"The best training class I have had in years. Goes way beyond the strategy and framework and focuses on real world problems and the tools to solve them."

Methodology tools



Change Management Toolkit: 3-ring binder with CD-ROM – complete process and set of assessments, worksheets and templates for creating change management strategy and plans




Change Management Pilot Pro: online methodology tool with "four-click" access to methodology, downloadable templates and assessments, benchmarking excerpts, presentations and numerous eLearning modules

Additional training

Train-the-Trainer program: Teaches you how to deliver Prosci's change management programs in your organization

Onsite programs for: Executives and senior leaders; Managers and supervisors; Front-line employees

Best Practices report



Best Practices in Change Management (2009 edition): most complete body of knowledge on change management available, with benchmarking results and lessons learned from 575 change practitioners – learn what works and what doesn't work for managing the people side of change

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Change management certification

"Very easily the best, most educational learning experience in which I have ever participated." - Chris T.

- **Prosci change management public sessions** (Tuition: \$2100)
 - 3-day certification program in change management
 - Work on an actual change project from your organization
 - Utilize best practices research with more than 2000 companies worldwide
 - Get input from seasoned executive instructors and fellow classmates
 - "Hit the ground running" with your change management plans when you return
 - Earn 2.4 CEUs, 24 PDUs from PMI and 19.75 HRCI recertification credits
 - www.change-management.com/change-management-training.htm
 - Offerings of the 3-day certification program:
 - Several times per month at locations across the United States, or at your location
 - Across the globe offerings by Primary Affiliates and Authorized Training Providers

"One of the best sessions for business training I have attended. Well structured methodology for immediate impact." - Ken M.

"Fantastic program to bring together the project management discipline with a change management methodology." - Keith S.

"Amazing experience - career changing for me. What I learned at Prosci's Change Management Program will allow me to transform my organization." - Shelly Z.

"Many training sessions only give the theoretical approach, but this one took it to the next necessary step of implementation. This will jump-start the change!" - Debra Q.

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Change management certification

Course locations across the U.S.
 Or bring the program to you – email training@prosci.com for information about onsite programs

Locations shown on the map:

- Peaceful Valley Ranch, Colorado Rocky Mountains
- Stanley Hotel, Colorado Rocky Mountains
- Seascape Resort, Monterey Bay, CA area
- Woodlands Resort, Houston, TX area
- Grand Geneva, Chicago, IL area
- Hotel Baker, Chicago, IL area
- Eaglewood Resort, Chicago, IL area
- Airline Center, Washington DC area
- Villas of Grand Cypress, Orlando, FL area

“This program absolutely over-delivered my expectations. I now feel more prepared and better equipped to do my job.”
- Paul S.

“Awesome - truly one of the most beneficial programs I have ever attended - immediate application on the job!”
- Robin S.

“This was the most effective and engaging course I've ever taken. I feel that I can truly use this knowledge in my personal and professional life immediately.” - Lisa S.

“The best training class I have had in years. Goes way beyond the strategy and framework and focuses on real world problems and the tools to solve them.” - Jennifer J.

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Prosci Train-the-Trainer

- The goal of Prosci’s Train-the-Trainer (TTT) program is to enable you to **facilitate an experience** that transforms how someone sees themselves when it comes to managing the people side of change.
 – www.change-management.com/ttt/index.htm

Courses you can teach following TTT:

- Prosci's 3-day program for change management practitioners and project team members
- Prosci's 1-day coaching program for managers and supervisors
- Prosci's 4 to 6-hour sponsor program for executives and senior leaders
- Prosci's 1-day primer for front-line employees

Topics covered in the 3.5 day TTT program:

- Philosophy and principles
- Success factors
- Preparing for a course
- The big picture
- Storytelling
- Transitions and activities
- Facilitator challenges
- Course facilitation

Prosci's TTT program is delivered at the Change Management Learning Center in Loveland, CO each month. See dates at the website above. Class size is limited to 5, so seats are limited.

“Companies around the world are building competency in change management to become more flexible in today's marketplace. Prosci's Train-the-Trainer program gives you the ability to provide these courses internally - and for a lower cost to your organization.”
 ~ Jeff Hiatt President and CEO, Prosci Inc.

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Resources for applying the Prosci methodology

- The following resources were used in the creation of this webinar. If you are looking for more detailed descriptions, checklists and tools, visit www.change-management.com/bookstore.htm for ordering information.
- Resources for developing change management plan
 - **Change Management Toolkit** (\$349)
 - Change management principles, process, templates and checklists in an easy-to-use 3-ring binder with CD-ROM
 - www.change-management.com/change-management-toolkit.htm
 - **Change Management Pilot Pro 2010** (\$449)
 - Online version of Prosci's methodology and tools
 - Updated content with latest best practices and new assessments
 - www.change-management.com/cm-pilot.htm

Reference and research materials

- Reference guides
 - **Best Practices in Change Management benchmarking report** (\$249)
 - 2009 benchmarking study, most comprehensive report ever
 - Lessons-learned and findings from 575 participants from 65 countries
 - www.change-management.com/best-practices-report.htm
 - **Change management: the people side of change** (\$18.95)
 - Introduction to and foundation in managing the people side of change
 - www.amazon.com and search for "change management"
 - **ADKAR: A model for change in business, government and our community** (\$18.95)
 - The definitive explanation of the ADKAR model and how it can be applied to create successful change
 - www.change-management.com/adkar-book.htm

Resources for supporting others

- Support for managers and supervisors
 - **Change Management Guide for Managers and Supervisors** (\$189)
 - 3-ring binder with detailed guidelines and exercises to help managers support their employees through the change process
 - www.change-management.com/managers-guide.htm
 - **Employee Survival Guide to Change** (\$14.95)
 - A handbook to help employees survive and thrive during change with frequently asked questions and tools for managing personal transition
 - www.change-management.com/survival-guide.htm
 - **Coaches training session** (onsite, call for pricing)
 - 1-day program full of exercises to apply coaching principles
- Executives and senior leaders
 - **Executive briefing** (onsite, call for pricing)
 - 4 to 6 hour session geared to show senior leaders how they can be successful sponsors of change, with assessments and application on real changes

Enterprise perspectives

- In addition to the tools for applying change management on a particular change effort, Prosci has offerings to support organizations who have taken the next step – toward managing the portfolio of change and building change management competencies throughout the organization
- **Change Portfolio Toolkit** (\$800)
 - A structured approach and set of tools for bringing clarity to the portfolio of change. Use Change Scorecards, the Group Impact Matrix, Change Heat Maps and the Portfolio Dashboard to better understand and manage the portfolio of change in the organization
 - www.change-management.com/portfolio-toolkit.htm
- **ECM Lab** (\$4000 + \$250 per participant for materials)
 - A facilitated design session that helps you and your team create a customized plan for rolling out change management in your organization.
 - Conducted over five “live” sessions with assignments for lab work in between by your ECM team.
 - www.change-management.com/ecmlab.htm

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