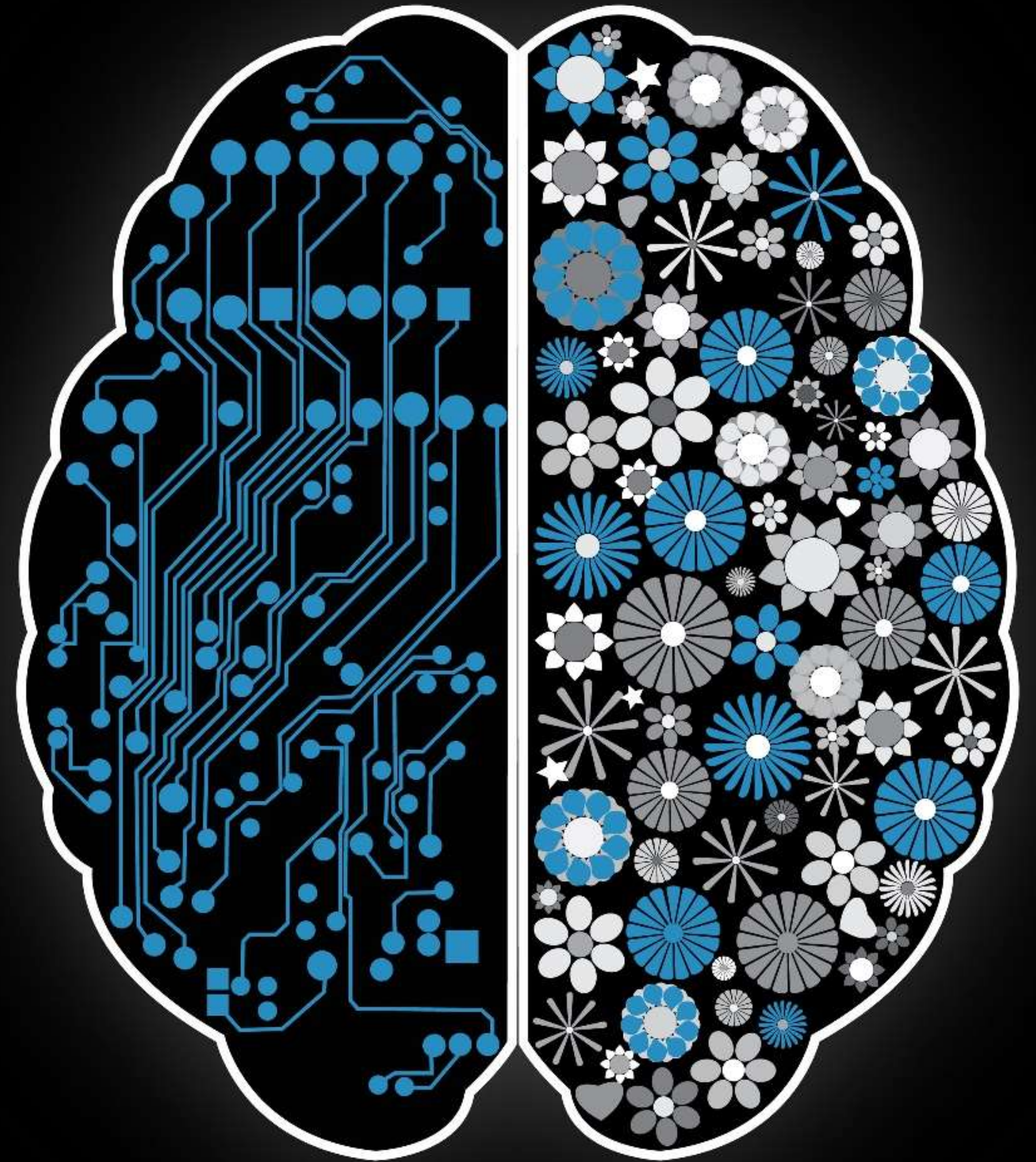# CRITICAL SUCCESS FACTORS IN CHANGE MANAGEMENT FOR HR TECH INITIATIVES

PAUL BLOCK
HR Operations, Twitter
@pmblock

HR Tech Fest
29 November – 1 December 2015, Australian Technology Park, Sydney

50%

OF CHANGE EFFORTS FAIL

@pmblock

CHANGE MANAGEMENT
IS CRITICAL FOR A SUCCESSFUL
TECHNOLOGY ROLLOUT

WHAT I'LL COVER

- My journey

- Why change management is essential

- What is change management

- How to use change management techniques

Once upon a time...

Before the Cloud

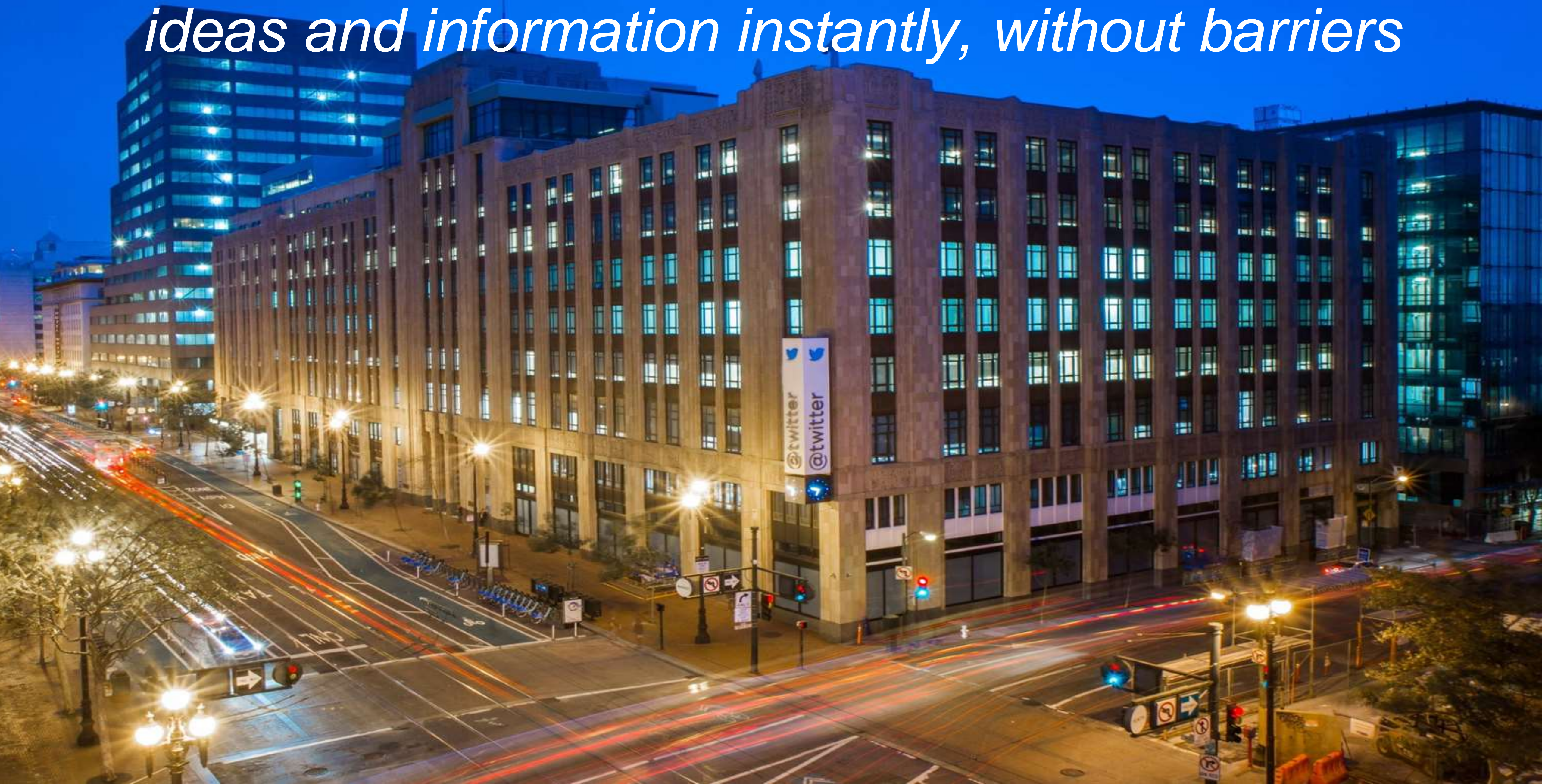*Bringing humanity back to air travel*
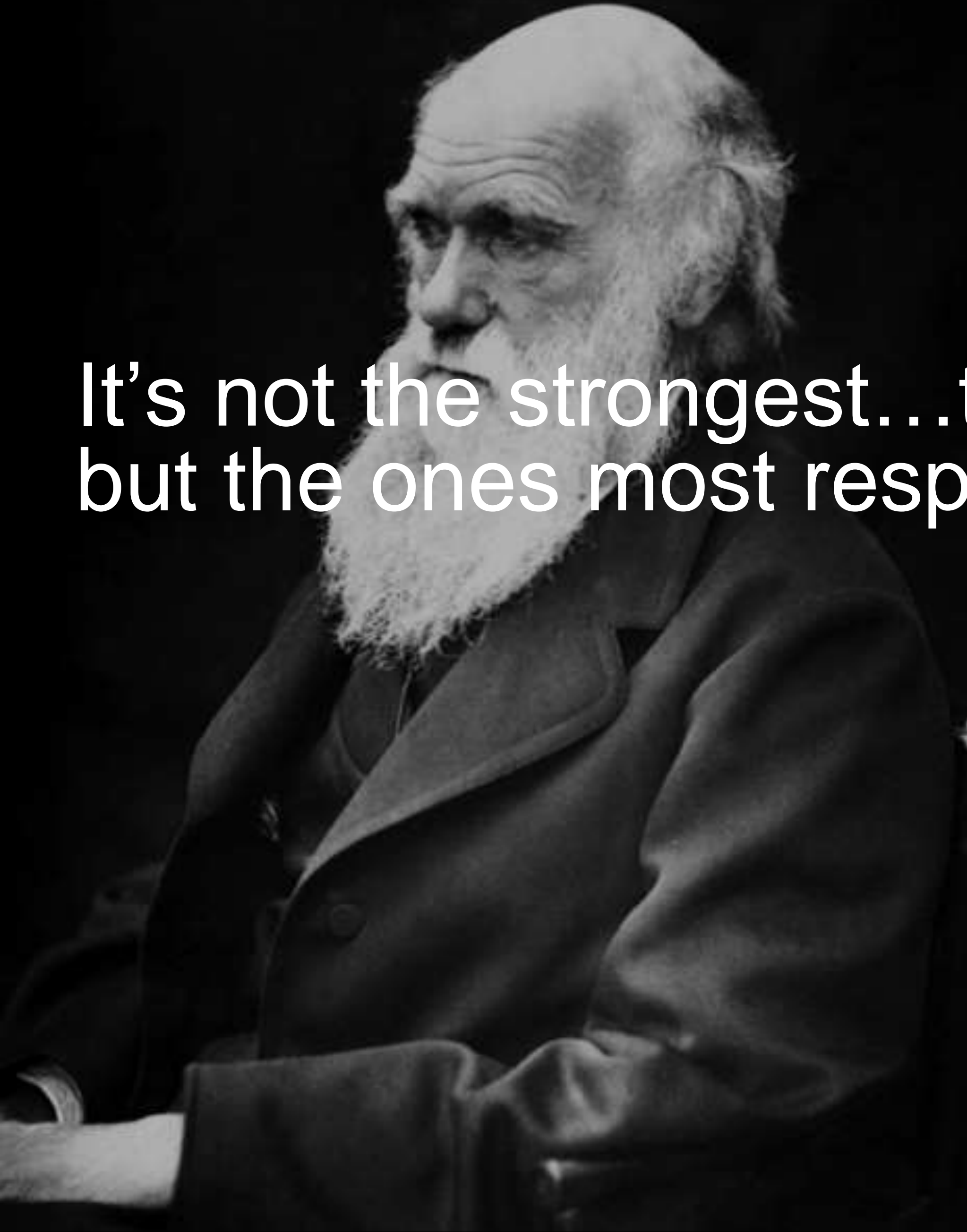
Fill every home with music

Give everyone the power to create and share ideas and information instantly, without barriers

WHAT I'LL COVER

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It's not the strongest…that survive, nor the most intelligent, but the ones most responsive to change.

It's not the strongest…that survive, nor the most intelligent, but the ones most responsive to change.

Charles Darwin
The Origin of Species, 1859

"There is nothing more difficult to take in hand more perilous to conduct, or more uncertain in its success, than to take the lead in the introduction of a new order of things."
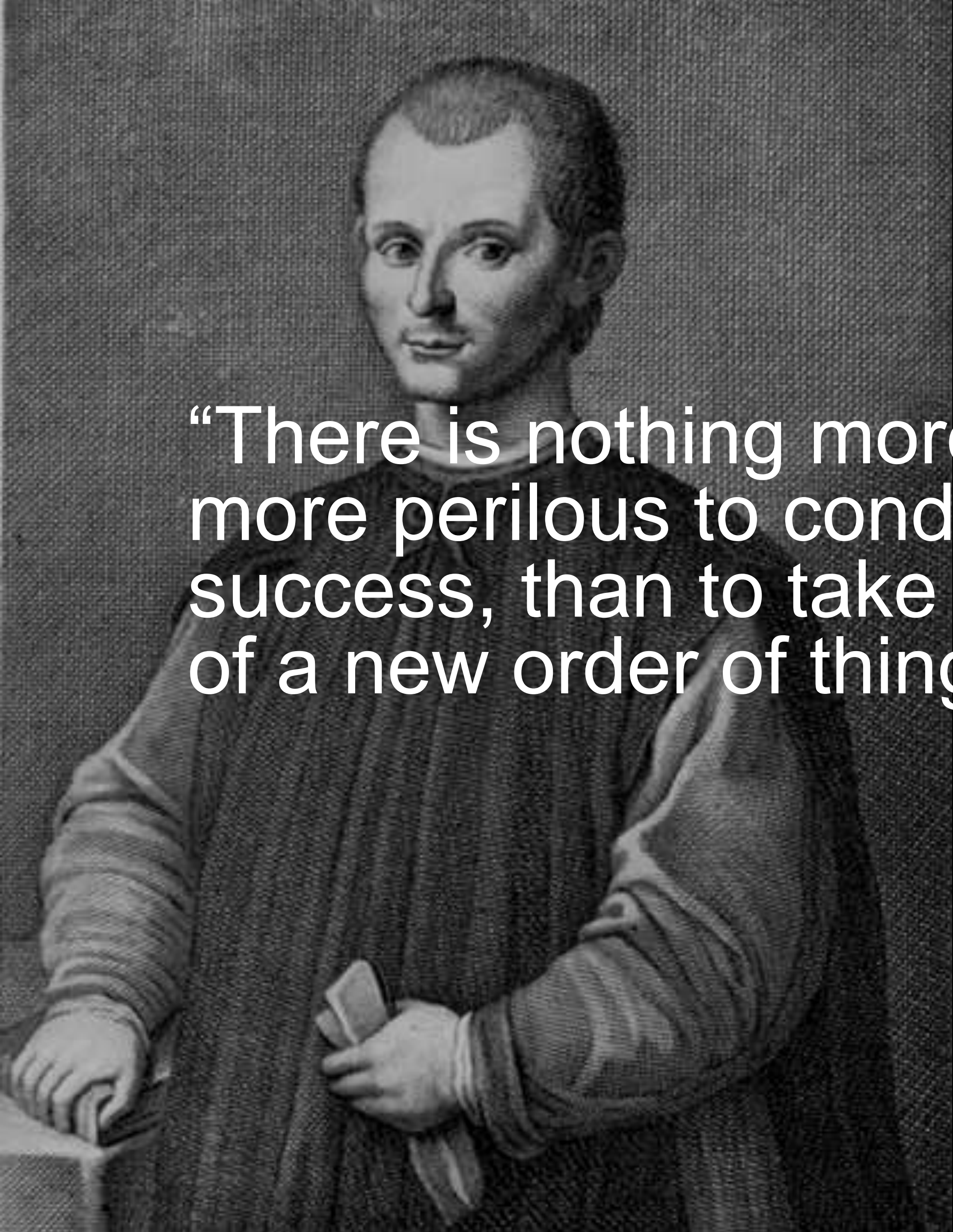
"There is nothing more difficult to take in hand more perilous to conduct, or more uncertain in its success, than to take the lead in the introduction of a new order of things."

Niccolo Machiavelli
The Prince, 1532

The only thing constant is change

CHANGE IS HARD!

Robert Kegan
Immunity to Change

DISCUSSION

Did anyone have a change initiative not go well?

What were some of the reasons?

Please use microphones.

REASONS TECHNOLOGY INITIATIVES COULD FAIL

Too complex

Difficult to use

Long learning curve

Takes to long

Bad experience

Don't trust it

Can't get info out

Can't get IT help

Limited access

Cultural barriers

WHAT I'LL COVER

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WHAT IS CHANGE MANAGEMENT?

CURRENT STATE

DESIRED STATE
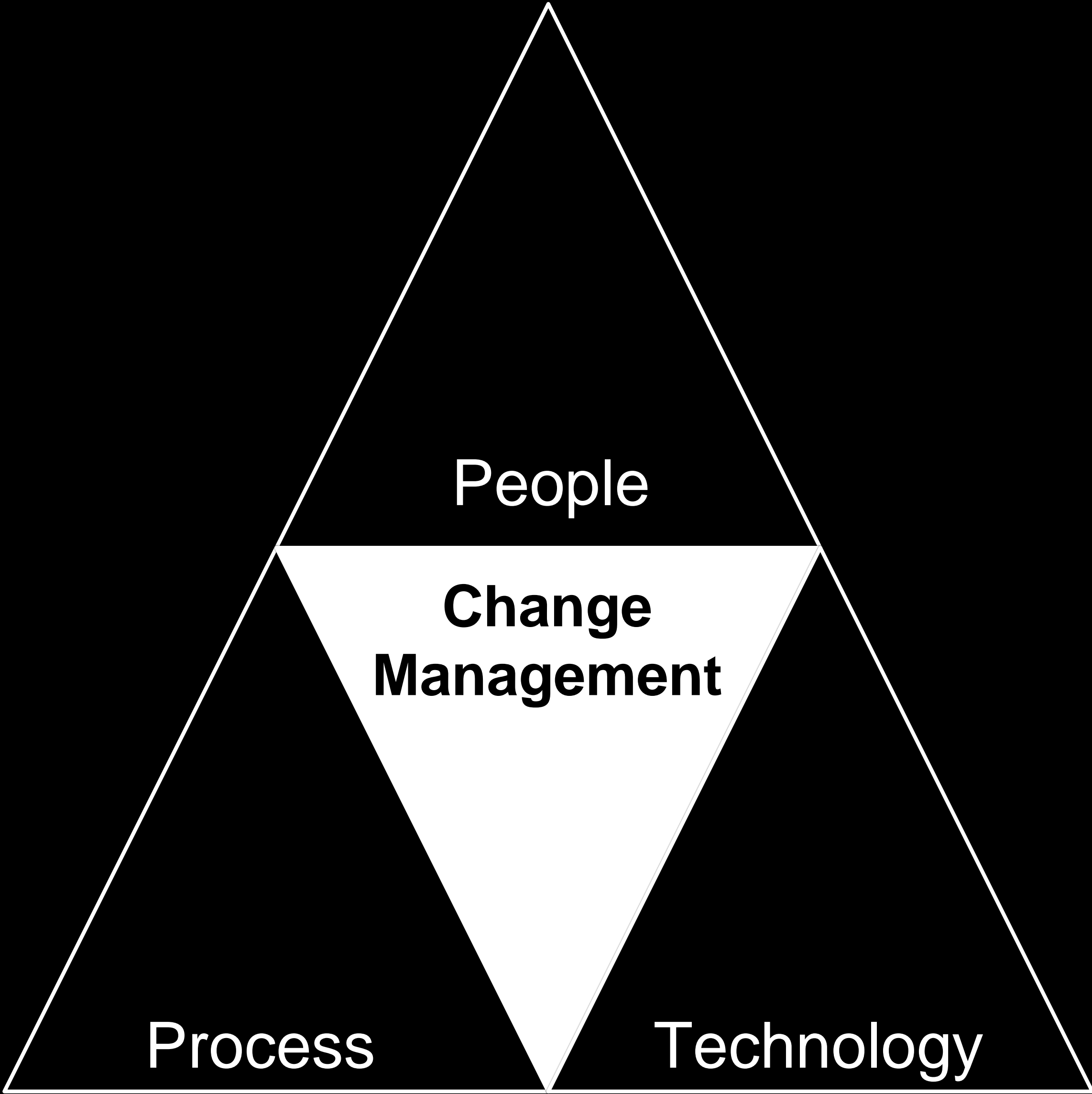
GOAL OF CHANGE MANAGEMENT

CHANGE MANAGEMENT ACTIVITIES

- Change Impact & Readiness Assessment

- Business Vision & Alignment

- Sponsorship/Change Leadership/Governance

- Communication Program

- Performance Enhancement (a.k.a. Training+)

- Organization Alignment

- Roles & Responsibilities

- Rewards & Recognition

- Continuous Improvement

WHAT I'LL COVER

- My journey

- Why change management is essential

- What is change management

- **How to use change management techniques**

THE CHANGE CURVE

High

Performance Levels

Low

Time

Current "As Is" Operations

⭐ New Initiative

Fear of the Unknown

Valley of Despair

Learning

Benefits Realization

Desired State, Post-Implementation

Can be exemplified by resistance, hostility, discomfort, frustration, etc.
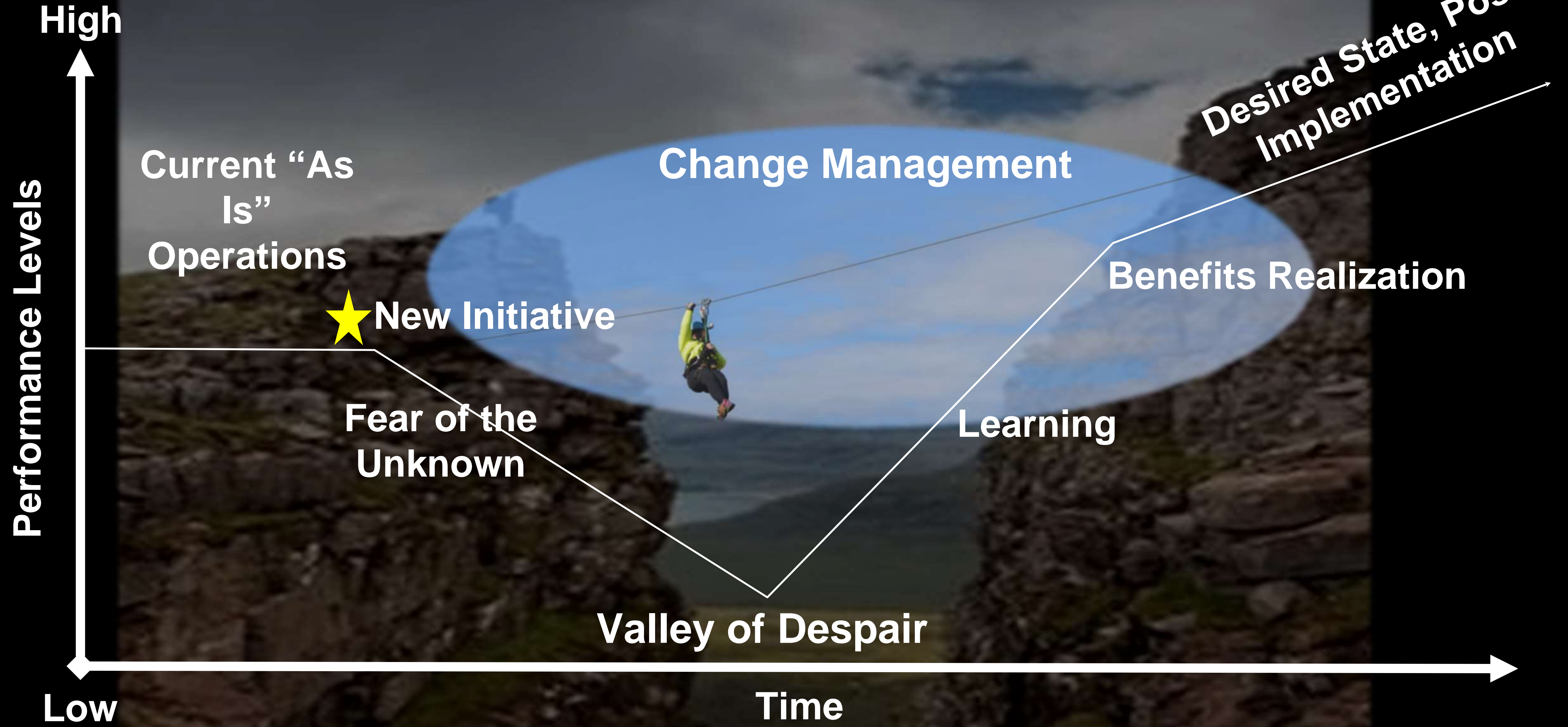
8 Step
Change Approach

1. Sense of urgency
2. Vision and strategy
3. Guiding coalition
4. Communicate
5. Empower others to act
6. Short-term wins
7. Build on the change
8. Anchor in the culture

AN ACTION PLAN FROM THE WORLD'S
FOREMOST EXPERT ON BUSINESS LEADERSHIP

Leading
Change

John P. Kotter

HARVARD BUSINESS SCHOOL PRESS
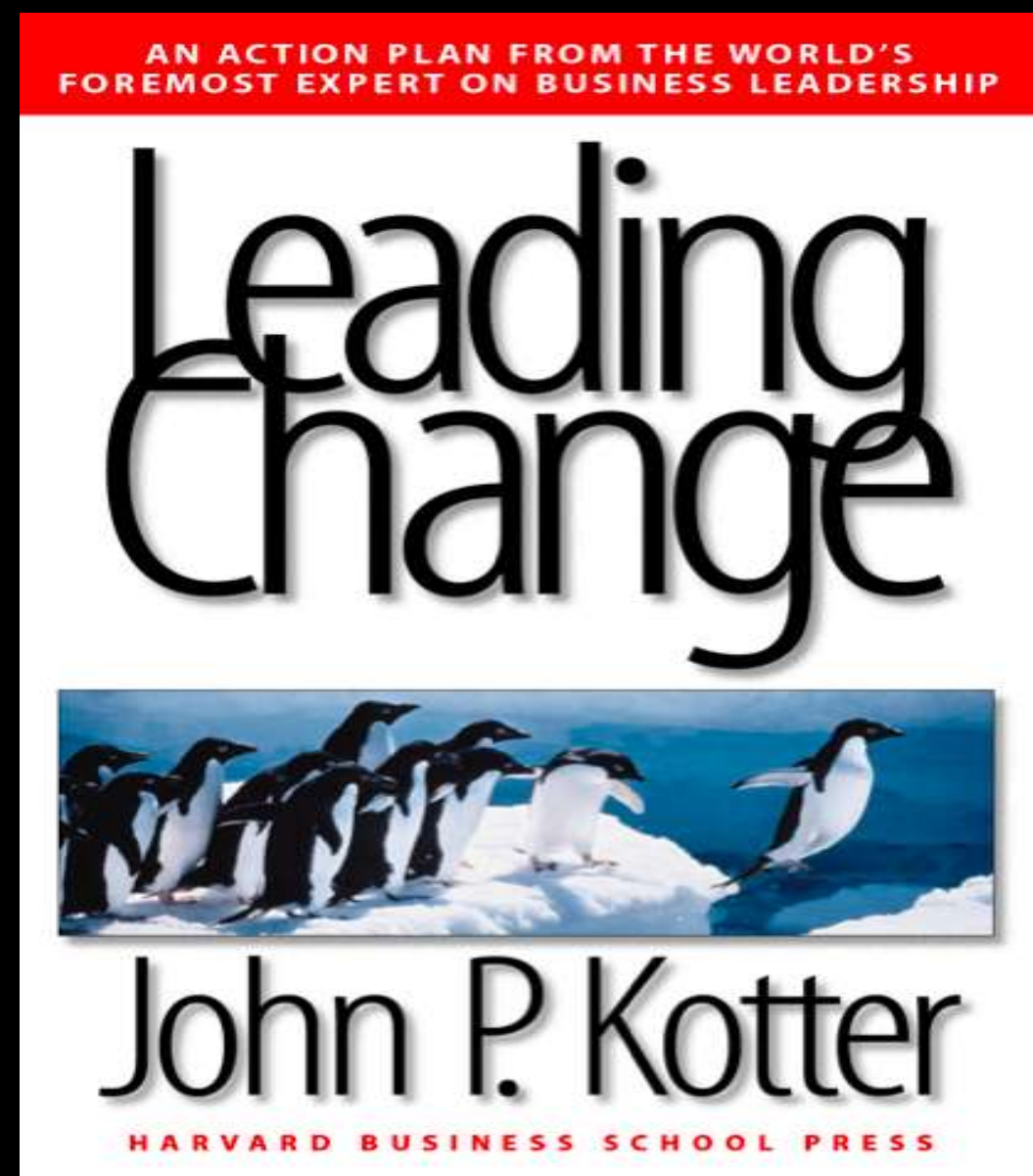
CREATE URGENCY

- Why is the change necessary

- Why is the change happening now

- Motivator to change
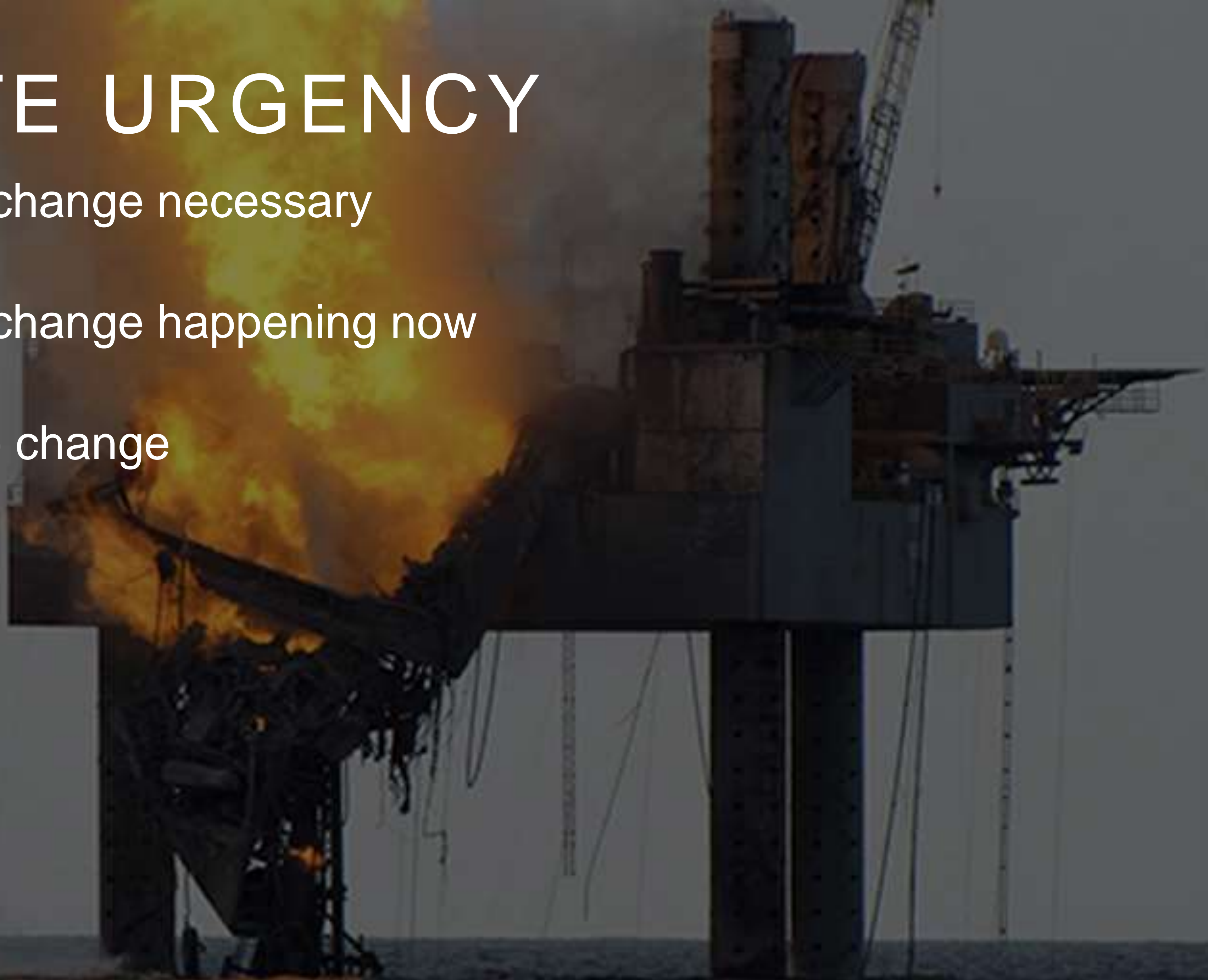
CREATE A VISION

CHANGE ROADMAP

- Where are we now?

- Where are we going?

- How will we get there?

CREATE CHANGE TEAMS

ENGAGE THE RIGHT PEOPLE TO DRIVE THE CHANGE

CHANGE LEADER ACTIONS

Awareness Understanding Acceptance Commitment Sustainability

Help others see the need for change

Engage people in the change

Create directions for change

Implement the change

Initiate the sustainability plan
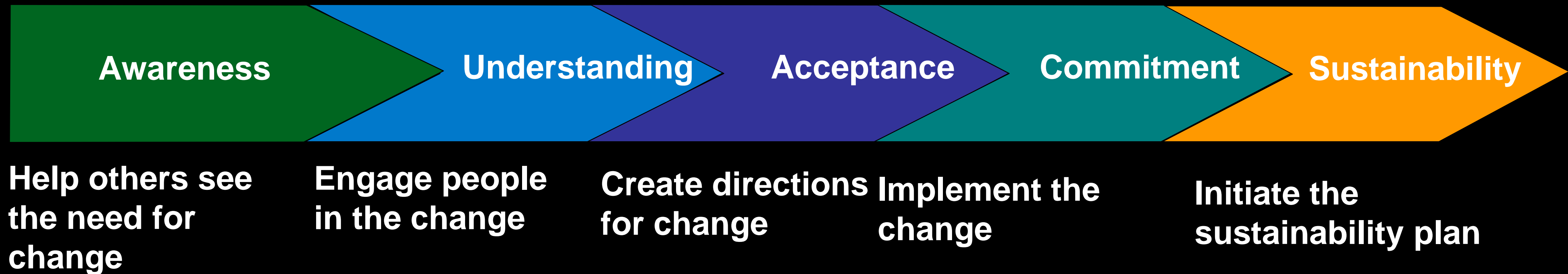
COMMUNICATING THE CHANGE

COMMUNICATION ACTION PLAN

Recommended engagement activities & events

Awareness	Understanding	Acceptance	Commitment	Sustainability
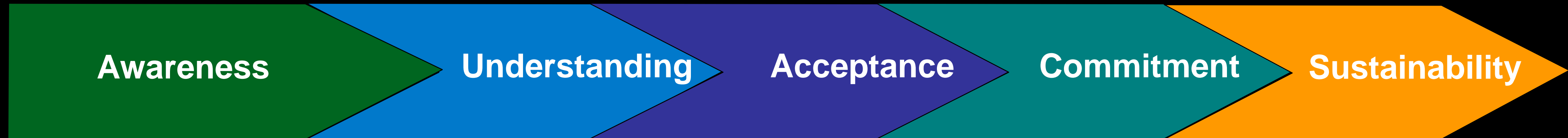
Awareness
- Memos/email
- Introductory presentations
- Intranet or newsletter article

Understanding
- Team meetings and discussions
- Focus groups
- One on one meetings
- Talk sheets
- Before/after scenarios (pictures)
- Design sessions
- Frequently asked questions (FAQs)
- Question/answer box (online or email group)

Acceptance
- Milestone maps (change roadmap)
- Bright idea forums
- Lunch and learn meetings
- User training
- Brainstorming sessions
- Weekly briefing sheets
- Newsletters
- Surveys

Commitment
- Posters
- Giveaways
- Celebration events
- Reward and recognition programs

Sustainability
- Support network
- Ongoing training
- Scorecard reporting
- Reward and recognition programs

AUDIENCE POLL ON TWITTER

When it comes to communicating changes, what do you think employees would like to see more of?

1) Email communication
2) Digital communication & social engagement tools
3) Face to face communication
4) None of the above

follow @hrtechfest to respond to poll

KRC RESEARCH STUDY

55% employees wanted more digital & social engagement

DIGITAL DISPLAYS

KRC RESEARCH STUDY

42%

employees wanted more face to face communication

MOBILIZING COMMITMENT

PRODUCE SHORT-TERM WINS

DIAGNOSE GAPS

ANCHOR IN THE CULTURE

CULTURE & WORKFORCE CONSIDERATIONS

CRITICAL SUCCESS FACTORS IN CHANGE

- Get buy-in early
- Engage change leaders
- Manage employee anxiety
- Ongoing communication
- Implement corrective actions
- Make it stick

Awareness

Understanding

Buy-in

Commitment

QUESTIONS

"Be the the change that you wish to see in the world" - Gandhi

How to Contact Me

@pmblock

APPENDIX

CHANGE ROADMAP (Sample)

Mar 15 | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov 15

Engagement: (Locally Led)

HRBPs engage international and local site managers to:
- Build the awareness
- Ask how to be manage change in their geography

HRBPs engage international and local site managers to:
- Build the awareness
- Listen to expectations for change

HRBPs engage international and local site managers on: what they need to do to be ready for go-live

HRBPs feedback check-in of user adoption/user features

Communication (Internal Comms)

Kick-off comms:
- Intranet, Head of HR email to managers and 'HR' team
  - 1-pager
- Hipchat groups
- Moments

Strategic messaging:
- HRBP office hours
- TV monitor spots
- Tea time segments
- Tweet Beat articles – starting with:
  - Employee Self Service
  - Business process changes
  - Manager Self Service

Tactical messaging:
- Newsletter articles
- Playbook page
- Drop in labs
- Direct Messages on Birdhouse
- Google Hangout Q&A
- Live Periscope demo
- TSC landing page

Launch messaging:
- Rationale, benefits
- What's not changing
- 'Tweep moments' vines
- Ready, set, go
- Local TV monitor spots

Adoption/utilization:
- Who is using Workday with what results
- Launch & learn comms.

Communities (Top down & bottom-up)

- Pilot team Hipchat group
- Workday Hipchat group
- HR Hipchat group

- Identify change champions via the HRBP manager engagement and Fusion team (approx. 55 required for Test + 25 for Roadshow
- Nurture Pilot Team (Target 100 in Test/ Road show)
- Identify super users (location + function, HR teams)
- Identify trainers
- Early sneak peek into sandbox environment

- Provide access to Workday (Sandbox environment) to change champion and Pilot team super user group

- Mobilize 'Pilot team' in local briefings
- Mobile super users and trainers
- Weekly briefings starting eight weeks prior to go-live

- Feedback Check-in with communities

Training (just in-time)

- HR team seminars on core features of Workday and what is changing:
  - Approvals/Workflow– how does it work?
  - Org& Team Structures – what can it do for you?
  - Business Processes – What this will mean?
  - Benefits & Comp – how will this change?
  - HR Shared Services – what is my role in this?

- Run train-the-trainers
- Run hands on training for power- users

- User training modules provided to trainers and power-users
- Populate self serve learning paths in LMS

- Online learning portal established
- New hire orientation (on boarding)

COMMUNICATION ACTION PLAN (template)

Event/Activity	Key Messages	Key Stakeholders	Vehicle	Impact (H,M,L)	Owner	Delivery Date Target	Delivery Date Actual	Notes/Next Steps
Awareness								
Meet with project team	* Objectives, scope, timeline, benefits * Governance Re: Key decisions, issues * Roles and responsibilities	Project Team	meeting	H	J. Lime	20-Jul	20-Jun	
Develop short Q&A for team members to share with their staff	* What is the change vision? * How are we going to get there? * Why are we changing?	Change Team Members	document/memo	M	J. Lime	20-Jul	20-Jun	
Meet with Executive Oversight team to update them on project refocus from Process to Platform	* Reinformce Objectives * Thank you for participation * Build excitement and ask for involvement	Executive Oversight committee	meeting	M	J. Lime	20-Jul	20-Jun	
Meet with other project groups to ensure alignment of projects	* Vision, objectives and timeline * Potential x-functional impacts * Working together effectively	Other Change Team's at BSC	meeting	H	J. Lime	21-Jul	20-Jun	
Understanding								
Loop Group meetings	* What is the status of the change? * What key decisions and issues need to be addressed? * How are we progressing?	TBD	meeting	L	B. McClean	monthly	Ongoing	
Executive team meetings	*What is the status of the change? * What key decisions and issues need to be addressed? * How are we progressing?	Members of Executive Committee	meeting	M	B. McClean	monthly	Ongoing	
Q&A	* Up to date Q&A that come out of the project meetings	All employees	posting on NPD website	M	J. Lime	bi-weekly	Ongoing	
meeting notes	* Recap Loop and Executive team mtg	All employees	posting on NPD website	M	J. Lime	weekly	Ongoing	
Roadshow	* What is the change vision? * How are we going to get there? * Why are we changing? * What's the status, as of today? * What benefits are in it for you?	All key stakeholders	meeting	M	B. McClean	9/15		
Acceptance								
Loop Group meetings	* What is the status of the change? * What key decisions and issues need to be addressed? * How are we progressing?	Wider functional teams not directly involved on platform development	meeting	L	B. McClean	monthly	Ongoing	
Executive team meetings	* What is the status of the change? * What key decisions and issues need to be addressed? * How are we progressing?	Members of Executive Committee	meeting	M	B. McClean	monthly	Ongoing	
Q&A	* Up to date Q&A that come out of the project meetings	All employees	posting on NPD website	M	J. Lime	bi-weekly	Ongoing	
meeting notes	* Recap Loop and Executive team mtg	All employees	posting on NPD website	M	J. Lime	weekly	Ongoing	
Commitment								
Loop Group meetings	* What is the status of the change? * What key decisions and issues need to be addressed? * How ready are stakeholders?	Wider functional teams not directly involved on platform development	meeting	L	B. McClean	monthly	Ongoing	
Executive team meetings	* What is the status of the change? * What key decisions and issues need to be addressed? * How ready are stakeholders?	Members of the Executive Committee	meeting	M	B. McClean	monthly	Ongoing	
Q&A	* Up to date Q&A that come out of the project meetings	All employees	posting on NPD website	M	J. Lime	bi-weekly	Ongoing	
meeting notes	* Recap Loop and Executive team mtg	All employees	posting on NPD website	M	J. Lime	weekly	Ongoing	
Sustainability								
Metrix update	* Where are we after 2 Quarters? * What are our next steps? * Are stakeholders taking ownership for the change?	All employees	meeting and handout	M	J. Lime and B McClean	1/15/2007		

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