



TREADWELL

Better data. Greater impact.

Monthly Event Topic:

CHANGE MANAGEMENT BEST PRACTICES

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Today's Agenda

- I. Recognize the Human Element
- II. Eight Steps to Successful Change
- III. Review best practices for change management
- IV. Discussion

Part I. Recognizing the Human Element

Negative Impacts of Change

- Communication breakdown
- Employee disengagement
- Resistance to future changes
- Lowered productivity

Effectively Managed Change

- Employee skill growth
- Improvement of morale
- Opportunities for advancement
- Cultural development

Part I. Recognizing the Human Element

Change

- Comes from the outside
- Situational
 - External forces create the need for change
 - Staff Changes
 - Grants/Funding Changes
 - Need for services

Transition

- Transition happens inside
- Psychological
 - An Individuals Reaction to Change
 - Victim
 - Critic
 - Bystander
 - Charger
 - Navigator

Part II. Eight Steps to Successful Change



Part II. Eight Steps to Successful Change

Scenario Description:

We are a part of the Data management team at your organization. A program manager has approached your team and while they have not previously use Apricot/ETO they are ready to transition their team from paper and Excel to your CRM system.

Think about a change you are/will be making at your organization – let's discuss at the end

Overarching Theme

BUY IN

Step 1: Establish a Sense of Urgency

Principle

Create a sense of urgency in the organization regarding the need for change and overcome complacency.

Paint a picture of a major opportunity, or even a looming crisis*, in a way that gets people moving.

This sense of urgency should inspire action among staff.

*be wary of spreading panic

Practice

Common Reasons for Urgency:

- Reporting Deadline
- Messy Data
- Missing Information
- Standardization across the agency

Step 2: Create a Guiding Coalition

Principle

Set up teams of people willing to implement the changes by working across departments and layers—to improve cross-silo communications. Identify and engage key managers and stakeholders who are able and willing to start working on the changes. Getting key people on board greatly increases the potential for success.

Practice

Survey your staff: Who **must** be involved because of their position? Who could or wants to be involved because they are excited about this change?

These folks will be your initial champions of the program.

Note: They do not have to be tech savvy or your best Apricot/ETO users.

Step 3: Develop a Clear Shared Vision

Principle

Craft a clear and compelling vision—one that people can easily understand, and that inspires people to help with the changes. Accompany the vision with strategies and plans to show how the vision is to be achieved. Done well, the vision and plans are believable.

Audacious visions and plans are fine, but unbelievable visions or nonviable plans are not inspiring—they hurt your chances of success.

Practice

Get feedback from your staff:

- What does success look like?
- What are your pain points?
- In a perfect world, what will Apricot/ETO solve for you?

Share out what you hope/plan to accomplish with your implementation with the team

Let them know if there are larger goals that may be addressed later

Step 4: Enlist a Volunteer Army

Principle

Find those individuals that want to be a part of the change and want to have a hand in making it a success. These are the people who will make the change happen (collectively).

Possible roles:

- Project Manager
- Subject Matter Expert
- Database Administrator
- Trainer
- Tester

Practice

- (This may be repetitive of your guiding coalition)
- Find the people that are **excited** and **enthusiastic** about this change!

Step 5: Enable Action by Removing Barriers

Principle

Before people can act on the vision, find and remove obstacles. These could be

- compensation plans or metrics that reward the wrong or old behaviors
- cumbersome approval processes
- overly controlling managers
- restrictive job descriptions

Scenario

Look at your Guiding Coalition and your Volunteers: empower them!

- Let your program staff express what the appropriate process should be for this program, let them help identify where people or processes "fall through the cracks"
- Be open to feedback: sometimes what we think should work is not actually practical in real life.

Step 6: Create Short Term Wins

Principle

The change process can take some time to complete, so it's often a good idea to start by breaking it down into smaller parts. Pick and execute one part early to establish a quick win—celebrate the successes and make sure everyone knows about it. This approach helps make the change process more real for people in the organization, especially for those who haven't yet fully committed.

Scenario

Celebrate those that want to be involved in the process!

After Discovery, share out what the draft solution design looks like with staff. Celebrate that you have a plan and the process is moving forward!

Step 7: Sustain Acceleration

Principle

Continue to execute your plan by building on your wins—expanding changes as appropriate. With each success or failure, be sure to work with stakeholders to find out what went right and what didn't. Know that some of your early assumptions may not come true. Your organization must recalibrate during the transformation. Quickly adjust plans and keep moving towards that vision.

Scenario

Continue to report those successes out and update the team on status.

Bring the team in often to assess successes

Look at your vision: are you making progress? Is it still a clear vision and is the path there still clear?

Step 8: Institute the change

Principle

Embed the changes into your organization so they can't be easily undone. In other words, make the new strategies, processes, and policies part of the daily fabric of the organization. That way they continue to exist long after the change leadership team's work is done.

Scenario

Make the change process smooth:

- Develop tools (ex. Workflows) to help guide staff
- Facilitate Training
- Develop and Make SOPs accessible for staff

Assess the adoption of the change:

- Create usage reports
- Create QA reports
- Ask the staff!

Part III. Best Practices

- ✓ Clarify your goal
- ✓ Define the change
- ✓ Assess potential challenges
- ✓ Create a roadmap
- ✓ Establish measurable goals
- ✓ Listen to feedback
- ✓ Invest in training
- ✓ Foster transparency
- ✓ Demonstrate patience (and ask for patience!)
- ✓ Reward good performance
- ✓ Understand change is not linear

Part IV. Discussion

Questions

Managed Services Program Benefits

Base Managed Services

- Consultation
- Support Coordination
- System Monitoring
- Access to exclusive monthly Treadwell events
- Discounts on additional services

Tiered Services

- Professional service hours
- Access to Treadwell's network of experts
- Credits towards advanced features

Next Month's Call

Results: Context 101

April 20, 2024

1 PM Pacific | 4 PM Eastern