

# The rationale for Change Management expertise

So you are starting an initiative and you are wondering if you need some of that 'Change Management thing'. And you are not sure what 'Change Management' is going to give you, or what you might need to get it. Here are some thoughts for your reflection.

## What is change?

Most simply, change is learning. Learning is change. Change (and learning) is a process. Change is a journey from a place here and now, to a place where you want to be.

## What is Change Management?

Change Management is a structured approach to managing change. The process of managing change can start at the moment the idea for change is expressed and end when the transformation is complete.

The change process occurs at both an organisational level and a personal level. The process can be structured and executed to make best use of resources and achieve desired outcomes in the most effective manner. An optimal change process draws on leadership and organisational development expertise, and conducts activities that are focussed on a satisfactory journey which reaches the desired destination.

Organisational change affects people. People effect organisational change. This symbiotic relationship can be harnessed so that the right change happens, and people adopt the change so that it might be sustained.

Change Management is not just what you do; it's also how you do it. Change Management is not simply some communication and training activities tacked onto a project; it's fundamentally how you do the project. Change Management is arguably the fundamental process of your project.

Managing change well increases the possibility that:

- The change destination is reached and the transformation is complete
- The organisation has adopted the change, and adapted so that the change is sustained
- The consequences arising from the change journey are positive
- Morale is strong and people are committed to the organisation and its goals

## Getting the right expertise; doing the right work

When determining what is needed to manage change, there are some typical responses that can be problematic:

1. "[The Project Manager can do Change Management.](#)"
2. "[We just need a Communications Plan.](#)"
3. "[Somebody internally will be responsible for Change Management.](#)"
4. "[The change is the implementation of a new product or process.](#)"

Each of these responses is explored in turn with some thoughts about what they really mean for you.

### **Response 1: “The Project Manager can do Change Management.”**

Some Project Managers have Change Management sensibilities and knowledge; it is not typical that they have the breadth and depth of expertise to design and conduct the change process. ‘Project Manager’ and ‘Change Manager’ can be conceived of as two different roles with different things on which to focus which require different expertise.

Project Management is a management proposition. Change Management is a leadership proposition. As with management and leadership functions, there is overlap and synergy with Project Management and Change Management.

Project Managers focus on the Project Management function: The delivery of agreed outputs against an agreed schedule and budget. Project Managers are responsible for the logistics of controlling and monitoring resources, schedules and activities between specific start and finish dates.

A person with Change Management responsibility, i.e. a Change Manager, focuses on the Change Management function: Achieving agreed outcomes that realise desired benefits. While the work of a Change Manager can be formatted as a project; there is a broader and deeper brief than delivering outputs. A Change Manager is responsible for assisting the leadership of an organisation in conducting the change process and achieving the change transformation. The start and finish dates for Change Management are typically fuzzy. Outcomes take time; generally longer than the project period.

Change Management is concerned with guiding and monitoring the dynamic people and organisational aspects of integrating the change specifically influencing people's willingness and capability to change. The ‘how’ change is implemented, is as important as ‘what’ change is implemented.

The Change Manager monitors social temperature, and cultural and environmental conditions. A Change Manager will typically spend a lot of time talking, listening and relating with people. They draw on organisational psychological expertise, and can provide strategic guidance for pastoral care and end-user advocacy for the organisation.

Change Managers mitigate different risks than Project Managers: Like, people failing to adopt the change; increase in anxiety/a drop in morale; lack of readiness to adopt change; lack of learning and support (organisational and technical) mechanisms to assist people through the change; and bad press about the project undermining confidence.

Performing the Change Management function not only necessitates specific expertise, it requires significant amounts of time that may not be available to the Project Manager. For large projects, a Project Manager is unlikely to be able to satisfactorily serve the organisation with dual Project Management and Change Management responsibilities.

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**The only many who behaved sensibly was my tailor; he took my measurement anew every time he saw me, while all the rest went on with their old measurements and expected them to fit me.**  
~ George Bernard Shaw

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## **Response 2: “All we need is a Communications Plan.”**

Yes, your change process will need to have plans for communication. However, communication is a broad concept whose breadth is not typically adequately addressed in traditional communication plans for facilitating change.<sup>1</sup> The spectrum of communication has at one end the idea of 'sending out a message', and at the other end, the idea of 'relating with one-another' where the consequences of the content and method of communication are significantly important.

Many projects fall short in that they act as if it was sufficient to simply send out or push messages, often in a generic broadcast via e-mail or newsletter, with little consideration to the outcomes of the communication act. Common reactions reported by users include “They (the project people) are not interested in how this affects us!”; ‘Another global email! I want to talk with someone about this’; “I’m frustrated because they don’t tell me what I want or need to know”; “They don’t understand how this is impacting me!”

A better approach to facilitate change is to develop and execute a stakeholder engagement plan. A stakeholder engagement plan includes activities and mechanisms, both proactive and reactive, to develop and sustain appropriate relationships with stakeholders. It includes consideration for incoming channels as well as outgoing ones. A key principle is actively involving people in the change process.

The purpose of communication is to inform, or to persuade or to initiate action. Your approach to achieving successful communication will require a range of activities to target different audiences at different times for different reasons. Stakeholders are not typically a homogenous group. It may be necessary to think outside the box and utilise methods beyond newsletters and information sessions, e.g. competitions, organisational storytelling, blogging, the grapevine, knowledge fair/expo, etc.

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**Tell me and I'll forget; show me and I may remember; involve me and I'll understand.**  
~ Chinese Proverb

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The ABO model<sup>2</sup> is a useful tool for guiding the design and execution of change: A = Awareness, B = Buy-in, O = Ownership. These are different stages of an engagement process where people move from learning about something; to acting on what they have learnt committing their time and resources; and then assuming responsibility often recruiting and initiating others to the cause. The assumption is that people are more likely to embrace change if they are able to contribute to and influence the change. As they understand and value the benefits they are more likely to accept the cost of changing.

The important consideration is that communication is a creative dialogue, a two-way conversation that continues over time rather than short bursts of monologue. Communications for facilitating change should be a relationally based and address the emotive component that is inherent in situations of change.

People will be changing, and so must the plan to address needs that emerge during the project. The change process needs mechanisms for actively monitoring the organisational environment. There is a need to be continuously ready to strategically change tack, or respond in a timely fashion to diffuse or excite a situation.

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<sup>1</sup> The traditional communications plans prepared on IT/IS projects are typically suitable for guiding the flow of knowledge and information between personnel on the project team; it is generally not sufficient for guiding the engagement with stakeholders outside the project team.

<sup>2</sup> The ABO Continuum is a concept developed by Anderson Consulting. Hiebelar, R., Kelly, T. and Katteman, C. (1998). Best Practices Building Your Business with Customer Focussed Solutions. Simon and Schuster: New York, NY

### **Response 3: “Somebody internally will be responsible for managing the change.”**

You may have valuable internal expertise that you wish to assign responsibility for conducting Change Management. If so, this expertise needs to have their current time and commitments reviewed to accommodate the extra (and sometimes unanticipated) work arising from managing change.

In addition, you will need also to put in place significant protection for these people as Change Management work can be psychologically demanding and can easily ‘burn out’ people if not moderated.

If you are not fully conversed with the scope of Change Management, then there is risk in assigning the role to someone without the right experience. It will be important to clearly define what you need from someone who is ‘responsible for Change Management’. Being responsible for managing change can mean a) having strategic oversight to see that change process is planned and executed, b) doing tactical, hands-on activities to execute change, or c) a mixture of the two.

Change is a leadership imperative and requires a leadership temperament as well as strategic and political skills. Engaging an experienced Change Manager is extending your leadership capability by acquiring executive level expertise to facilitate your change process.

Some considerations about the pros and cons of somebody internal vs. somebody external:

- Your own internal people don’t have the time to commit to the work required
- You don’t have the sufficiently experienced expertise
- You want someone who understands the political and organisational issues and works with your leadership
- You want fresh insight and energy
- You want someone without a history in your organisation ... and without a future
- You want someone who will do things differently, i.e. not the same way. Change means change!
- You want to inject fresh expertise into your organisation, maybe mentor your staff
- You want to move quickly and surely without the costs of experimentation
- You want the quality assurance that comes with knowing what to do and how to do it effectively

### **Response 4: “The change is the implementation of a new product or process.”**

Change is more than the implementation of a new product or process. It’s adopting and utilising the new thing to achieve some organisational benefits. It’s creating new thinking and behaviours while rejecting old thinking and behaviours. A change for your organisation means a change for your people. What change are you asking of your people?

The implementation of a new system is what you are doing; it is the precursor to fulfilling a desired change in your organisation. Leaders of an organisation typically identify some organisational benefits to get from undertaking the change. To win buy-in and ownership from everybody, it will be important to find meaningful answers to the ‘what’s in it for me’ question, i.e. personal benefits. The answer to this question is what will motivate people to committing to and making a personal change. To facilitate people to support and participate in the change, it is important to answer the ‘what do I need to do’ and ‘how will I be able do it’ questions so that they might be capable of the change.

In defining the change wanted, it becomes more possible to map out the breadth and depth of the stages of transition people will go through from here to there. For some people, the change may have an aspect of grieving as they lose the old way of being and doing, and move on to the new way of being and doing within the organisation. With a clear understanding of what the change is, is it more likely that the right resources and activities will be utilised by the project.

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