

Change Management

Presented by: Christine Battles

AP Manager

Symbotic, LLC

Do you need NASBA CPE credits?

- Navigate to website: iofm.cnf.io or scan the QR code →
- Check-in and check-out of your sessions to track your attendance for NASBA CPEs
- Certified with IOFM? No need to check-in and out of sessions. Self-report CEUs on IOFM.com instead after the event!



Agenda

- Define Change Management
- Discuss the biggest challenges associated with Change Management
- Operationalizing successful Change Management

What is Change Management?

Definition:

Change Management is the process, tools and techniques used to manage the people side of change to achieve a desired business outcome. It involves preparing, supporting, and helping individuals, teams and organizations in achieving organizational change.

Common Challenges

- Lack of Leadership engagement, support and commitment
- Resistance - employees or stakeholders
 - Change happens through people – not just plans
 - Most change efforts fail due to resistance from employees, lack of engagement or poor communication (not because the plan or technology was flawed)
- Communication – none, poor or infrequent communication
- Insufficient or inadequate training and resources (failure to adopt)
 - If people don't adopt the ROI suffers
 - Spending millions on a new CRM or ERP means nothing if users revert to old processes, or avoid using the system
- Ineffective planning and unclear objectives
 - Causes Confusion
 - Low Productivity
 - Frustration and burnout
- Cultural barriers

Why is Change Management so difficult?

- The Human Factor is often underestimated
 - Leaders often view change as technical or operational issue (new software or process) and underestimate or overlook the psychological & behavioral aspects and impact of the change
- Perceived as a “Soft Cost”
 - Seen as “optional” or a soft investment, unlike the investment in software or hardware
 - When budgets tighten its often one of the first items cut, even though it directly impacts the ROI of the initiative
- Short Term Thinking
 - Focus is on short term deliverables & KPIs
 - Requires time, planning and upfront effort (BEFORE the initiative is kicked off) which potentially delays visible short term results even though it improves long term outcomes
- Lack of Awareness or Understanding
 - Many don’t know what effective change management entails (sending an email or holding a town hall may not be sufficient)
 - May be confusion between project management & change management

Why is Change Management so difficult?

- Leadership Gaps
 - Strong change management requires visible, active sponsorship and engagement from leadership
 - If leaders aren't aligned, don't model the desired change, or don't prioritize communication, employees follow
- Change Fatigue or Cultural Resistance
 - Skepticism regarding the value of formal change management may be present in organizations that have gone through multiple failed changes
- Difficult to Measure ROI
 - Success is harder to quantify (than cutting costs, or increasing sales)
 - Its not always clear what part of a successful change initiative is due to the change management effort = results in it being undervalued

Successful Strategies

- Develop a detailed change management plan with defined objectives and specific milestones
- Clear and consistent communication (reasons, benefits)
 - Change can be disorienting
 - Communicate clearly, emphatically and frequently
 - Address Fears and the “WIIFM”
- Strong Leadership involvement to champion the change
 - Leadership needs to be visible and participate
 - Align people around a common purpose
 - Create a shared narrative that connects individuals roles to the broader vision
- Early engagement and participation of employees in the change
 - Effective change management involves people early in the process

Successful Strategies

- Provide training and support to build the necessary skills
 - Change often requires deep shifts in culture, mindset and behavior
 - Build reinforcement mechanisms
- Monitor progress and make adjustments as necessary (flexible)
- Reinforce change through rewards and recognition

Successful change management can deliver results faster, reduce resistance, strengthen trust and build a culture of adaptability

Actionable Takeaways

1. Clearly Define the Change & Align Organizational Systems & Processes
2. Secure Visible Executive Sponsorship & Understand Stakeholders
3. Craft a Compelling Communication Plan & Provide Training and Resources
4. Enable Managers as Change Agents & Measure, Reinforce & Iterate

Please tell us what you think!

- Please scan this QR code using your mobile to access a short feedback survey →
- Also accessible via the mobile app



Change Management & Adoption Strategies

QUESTIONS?

Christine Battles
Accounts Payable Manager
Symbotic, LLC
cbattles@Symbotic.com
978-284-2800

REMINDER!

If you checked in for NASBA CPE credit, check out at iofm.cnf.io