Organizational Change Management for Records and Information Management

GWDC ARMA Spring Seminar
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Agenda

- Change Management Definition
- Critical Success Factors
- Change Management Tools and Techniques
- Cost-Effectiveness Assessment

Definitions of Change Management

- A structured approach to shifting/transitioning individuals, teams, and organizations from a current state to a desired future state. *(wikipedia.org)*

- The process, tools, and techniques to manage the people-side of business change to achieve the required business outcome, and to realize that business change effectively within the social infrastructure of the workplace. (*Change Management Learning Center)*

GAO CM Definition

Activities involved in

(1) defining and instilling new values, attitudes, norms, and behaviors within an organization that support new ways of doing work and overcome resistance to change;

(2) building consensus among customers and stakeholders on specific changes designed to better meet their needs; and

(3) planning, testing, and implementing all aspects of the transition from one organizational structure or business process to another. *http://www.gao.gov/special.pubs/bprag/bprgloss.htm*

Change Management Methodologies

- Choose one of several good approaches
- Apply a structured model throughout change
- Use a Checklist to ensure
  - Methodical planning
  - Appropriate project support
  - Effective communications
  - Engaged stakeholders
  - Resistance mitigation
  - Ongoing training
  - Implementation monitoring

Critical Success Factors

▸ Strong, ongoing senior management support

▸ Effective planning

▸ Well-defined scope, clear vision; measurable objectives tied to strategic direction

▸ Committed, high-level change "champion"

▸ Dedicated, skilled project team

▸ Detailed Communications Plan

Communications Plan

- Informs all stakeholders of the reasons, benefits, and details of the change
- Involves everyone that will be affected by the change
- Includes a Sponsor Roadmap, a Resistance Management Plan, and a Training Plan to upgrade skills
- Monitors and fine-tunes

Resistance to Change

- Biggest threat to organizational progress
- Ability to change depends on employees
- Change affects the business and the individual
- Performance won't be transformed overnight

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- Change works best when it is a collaborative, interactive process.
- Share as much as you can about what is likely to occur if the change does not happen.
- Change from within the workforce.

Effective CM Tools

- **Planning**
  - SWOT Analysis
  - Purpose and Vision
  - Sponsorship Discussions
  - Change Team
- **Commitment**
  - Elevator Speech
  - Stakeholder Analysis
  - RASCI Model
  - Communications Planning

- **Build/Implement**
  - Project Plan and results tracking
  - Communications Plan
  - Risk Analysis
- **Transition/Monitor**
  - Storytelling
  - Refresher training
  - Tips and Tricks
  - Celebrate wins
  - Reward for performance

Return on Investment (ROI)

- McKinsey Study, 2002
- Studied projects of over 40 companies
- Variable: "Effect of an organizational change management (OCM) program on ROI"
- The study showed the ROI was
  - 143 percent when an excellent OCM program was part of the initiative
  - 35 percent when there was a poor OCM program or no OCM program
- 11 most successful companies had excellent OCM programs

Measuring ROI

Net Project Benefits = ROI
Project Costs

Where ROI =
Benefit of Project – Project Costs X 100
                    Project Costs

Questions?

Thank You!