

Webinar

Change Management in Action

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About Us



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The What & Why of Communications and Learning

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How do you or the project team communicate changes?

How people managing a change typically handle communication and learning....

- ✓ Did we communicate a go-live date?
- ✓ Did was there learning conducted?



How do your users hear and learn about changes?



How people experiencing the change hear and see the impact...

- ✓ Is this change going to benefit my role/job?
- ✓ Will I need to rethink how I am working?
- ✓ Do I need to know important things about this change?

Practice & Methodology

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Is it a People, Process, or Technology Change?

Pt. 1: Intro to Change Management
(Mid-December)

Today's Topic

Pt. 3: Enabling Organizational Change with Microsoft Teams
(March)

Ask...	If "Yes", follow-up with...	Next steps
Will this impact the technology people use?	How will this impact our people?	Conduct a change readiness assessment
Will people have opportunities to work differently?	How can the business become more efficient?	Begin brainstorming the possible
Does this require our business to organize data differently?	How can we make this new way of working easier to understand?	Develop a communication strategy
Does this change impact how people do their tasks on a day-to-day basis?	How can we make this easier for our people to adopt?	Develop a learning & readiness plan
Is this change taking place during any important events to your business?	Who is the sponsorship for these other changes?	Develop a coaching/risk mitigation strategy

Understanding the possible

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What is this change improving

- Does your people, process, or technology change bring about new ways of working?
- What concrete examples can you provide to the business to help people see the benefits of the change?
- Do you have multiple ways this change will bring new ways of doing things?

Understanding who will use it

- Do you understand how this change will impact specific roles?
- Would specific roles benefit from understanding certain ways of working?
- How do you know when impacted groups will have successfully adopted the new way of working?

Business Use Case - *Guide*



As someone in...

(Team)

Example: In this line create a name for the impacted group – try to stick with a few defined groups (personas)



I want to...

(Description of what I want to do)

Example: Provide the description of that the new people, process, or technology can accomplish for the impacted group – this is using business or applicable language, don't get techy here.



Using...

(Specific application of the technology)

Example: This is where you will outline the high-level technology and steps needed in order to accomplish the "I want to..." line in this worksheet. Your solution.



I'll know this is successful when...

(Solutions success measure)

Example: In this area outline what success would be for the business. Keep this relevant to the "I want to..." line.

Business Use Case - *Example*



As someone in...

(Team)

My organization as an:
Everyday User



I want to...

(Description of what I want to do)

Give clear description of task/objective someone in this role/persona needs to achieve



Using...

(Specific application of the technology)

This is the section to get technical to meet the use listed above



I'll know this is successful when...

(Solutions success measure)

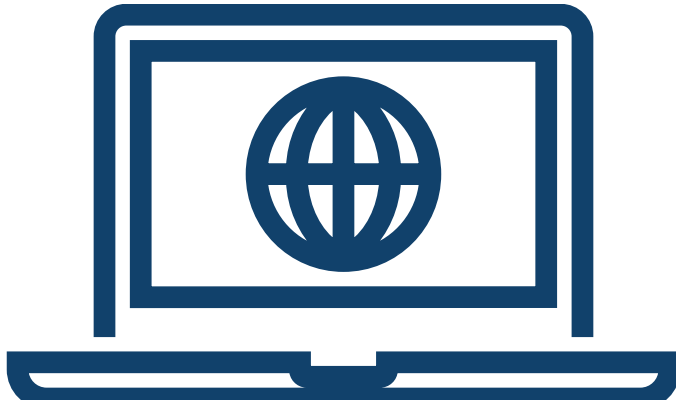
Success metric should be a tangible action employees can successfully perform

Accounting for complexity

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Building a Readiness Plan

The Main Components



The Change

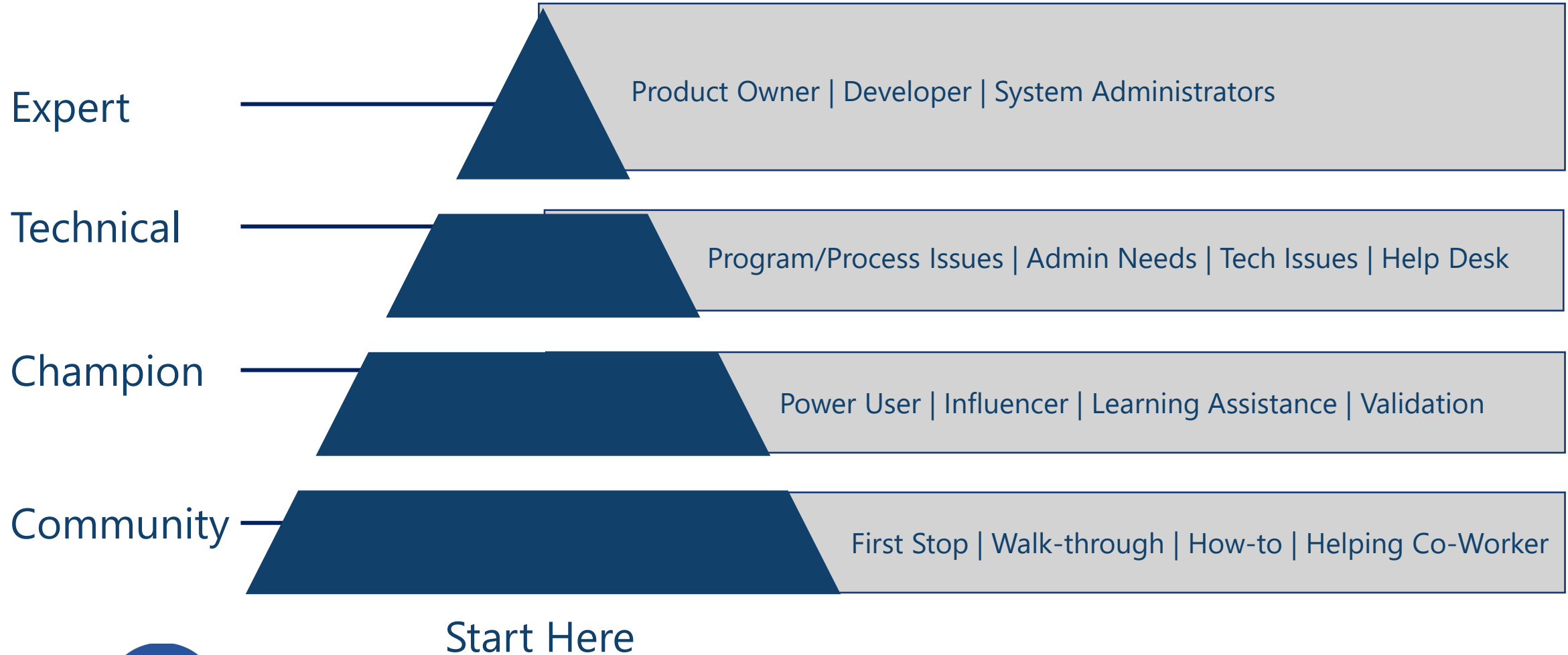


Learning



Communication + Support

Embedding Support



A Complete Readiness Plan

On-Stage Planning

- Events - Learning, Road Shows, Champion Training, Coaching
- Communications – Talking points, briefing kits, intranet site

Off-Stage Planning

- Communications – Emails, recordings, posters, etc..
- Learning Pathways – Persona learning, content, delivery, launch

People

- Expectations – What can be done the change vs. what the change can't do
- Support Plans – Strategy, communication of support expectations
- Risk Mitigation - Coaching Strategies

Technical

- Testing – User Experience, technical testing, user acceptance

Example: A complete readiness plan

Project:

Wave/Release Group:

Impacted Persona:

Stage	Awareness	Desire	Knowledge	Go-Live	Ability	Reinforcement
Timeline	T – 21 days	T- 14 days	T-7 & T-3 days	T- 0	T + 1 day	T + 7 days
Communications	Email – Introducing effort, timelines, how to gain access to learning	Management + leadership teams - Cover change in weekly team meetings and 1:1	Email Launching learning	Go – live communications, support reminders	Reminders about support via manager/champion channels	Satisfaction surveys reminders of learning pathways
Learning Pathway	Final review of learning with stakeholders	Introduce management + leadership to learning	Launch and track learning	Monitor content	Add content as requested	Add content as requested
Support	Final review of support plan with technical and stakeholders	Introduce support plan to leadership and management	Launch support plan	Support users based on strategy	Report to team repeated or high impact issues	Adjust according to need
Technical	Final product analysis/feature breakdown	Implementation	Implementation	Launch	Support	Support/Hand-off
Champion Network	Assemble members launch deliver briefing kits	Learning Pathways introduction	Objection handling, setting expectations	Communicating, supporting users	Support Users Report Feedback	Support Users Report Feedback

Why your user personas matter

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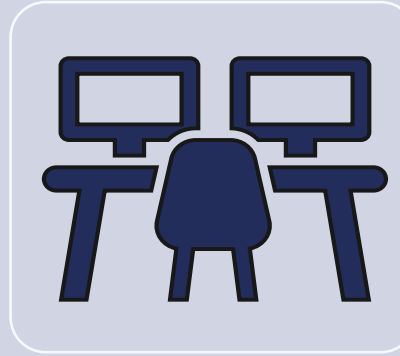


Imagine this...



You work as an Admin Assistant

- Quick Service
- Ability to access information
- Working against time constraints



You work as a back-office professional

- Correct analysis and forecasting is critical
- Typically has time to complete tasks



You work direct sales and travel

- Needs to understand mobile
- Have tools for communication

A blue-tinted photograph of four people in a meeting. A woman on the left is looking at a laptop. A woman in the center is smiling and looking at a laptop. A man on the right is looking at the laptop. A person in the foreground is seen from behind, also looking at the laptop. The text 'Let's think about our 3 personas' is overlaid in white on the left side of the image.

Let's think about our 3 personas

- Where would there be similarities in how these 3 personas would use the tool?
- How will learning time impact these people?
- What features and functions of the change will be more important to some personas over others?
- How will these people's daily interactions with others be impacted?
- How will these personas be impacted by the change?

Simple Selection + Easy to Follow

- Keep your persona tracks easy for people identify with
- Your organization may create personas at the HR, IT, or in the Business
- You'll benefit from leadership buy-in/approval for using this learning and communication method

Persona Considerations

What to include in your persona breakdowns

- Persona name
- Roles the persona encompasses
- Preferred learning methods
- Time expected to be spent on learning
- Preferred communication methods
- If there is any required quiz/certification post learning
- If there is any continued education

Important: Consider how and where you'll store this information. Some organizations consider this sensitive data about employee organization/work.

Getting personal with communications

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Writing Communications

Communications should account for the project and technical timelines along with business and persona needs.

Consider this...

If you were going to explain the change in a conversation, which words would you use?

Remember...

Leave tech jargon/abbreviations for IT

Use ADKAR

- Consider the stage of the process

Write for Persona

- If launches are persona-based, consider the people you're talking to

Timely and Relevant

- Don't add fluff, jargon, or additional info.
- Keep it brief and factual

Review with Leadership

- Track and ensure leadership buy-in to keep everyone on same message

Creating timely, relevant learning pathways

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Learning Pathways

Learning pathways and supported content should account for features/functions along with best practices of the change.

Consider this...

Different roles abilities to attend learning sessions and delivery methods.

Remember...

Production/Retail/Sales roles typically have the least amounts of times for these activities.

Use ADKAR

- Consider the stage
- Give clear direction of what the user will take away from materials

Write for Persona

- Depending on the change, do that have different roles to play?

Timely and Relevant

- Ensure your delivery isn't too early or late

Review with Leadership

- Track and ensure leadership is aware of the learning pathways topics

Building-in flexibility



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Change is not linear

Remember, everyone processes the changes of their internal and external worlds differently.

Some people can take longer than others to feel and process the excitement and fears of the unknown.

It is important to account for integration weeks, or time for people to fully process.

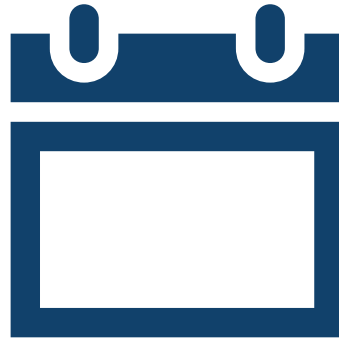


Why integration matters

Building in weeks



Vacation Seasons and Travel



Blackout Dates and Busy Seasons



Burnout

What's Next?

Upcoming Change
Management Webinars

Pt. 3 - Enabling Organizational Change with Microsoft Teams

- March

Thank you!

Schedule your assessment:

<http://help.apexdigital.com/change>

Q&A