CHANGE MANAGEMENT

A Guide to Aligning Change Management Activities to Project Phases

By Corinne Sinnigen

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Change Management

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About this eBook

Organizations are constantly being challenged to change. Yet, it is organizations that seem to lack a defined, structured change management methodology that is effectively used alongside a project lifecycle, often causing organizations to struggle with creating adoption for change. In my many years of consulting, I have witnessed two common threads. The first is that most clients have no methodology to follow in order to successfully manage and support change. The second is that only a few clients have some type of methodology that has been obtained, but without any guidance on how to align the change methodology with the lifecycle of a project. In both scenarios, I have witnessed clients struggle with how to effectively engage key stakeholders in meaningful ways that provide education and buy-in for supporting change. Without the much-needed support, many projects go through a series of starts and stops, impeding the credibility of those leading the change effort, and ultimately, leaving a bad taste for change in the mouth of the organization.

It is for these reasons that I have developed this eBook. I have found throughout the years that a well-structured change management methodology that is properly aligned to the lifecycle of a project directly contributes to project success. It is with this alignment that I have found strong partnerships between change and project teams have contributed to quality deliverable development, effective and consistent communications, and strong engagement. As a result, organizations that accomplish this alignment are well suited to successfully manage their projects while building credibility for leading change.

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About the Author

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Corinne's passion is in seeing others shine. Her expertise is in organizational change management, project management, professional facilitation, and executive coaching.

Corinne earned her bachelor's degree in History from the University of California, Irvine. She earned her certification in Training Program Management and Instructional Design from California State University, Fullerton, and is a DDI certified professional facilitator. Formerly working as a teacher, she began her career in training with Ernst and Young Application Services in Irvine, CA, where she developed, delivered, and managed technical and business skill training programs. She held a management position with Capgemini Consulting, where she managed core-consulting skill programs across the United States and Canada. During her time with Capgemini, she also served in multiple client-facing roles, leading training and organizational change management work streams for large scale business and technical implementation projects across multiple industries. In addition, she spent ten years as owner and President of ChangePac, LLC, a consulting company that provided an array of consulting services for human resources, IT, and clinical departments in healthcare.

Corinne's passion lies in the ability to help others reach their potential by embracing change. A quote by Timber Hawkeye sums up her drive to help others envision and engage on their own personal change journey, "Don't let the concept of

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change scare you as much as the prospect of remaining unhappy." Today, Corinne's project focus has spanned coaching, organizational change management, and facilitation opportunities that drive clients to experience and embrace new and exciting things. For Corinne, these opportunities provide the chance to help others see that change can be a lot easier than they think and that it is one of the greatest moments to experience.

Corinne is married, has two adult children and two grandchildren, and resides in Dana Point, CA. She spent several years as a runner, having completed four full and two half marathons. She is an avid surfer who enjoys the thrill of riding the waves along south Orange County beaches and takes every opportunity to spend time gourmet cooking. She supports Wounded Warriors and supports missionaries abroad who are dedicated to working with underprivileged children in New Zealand.

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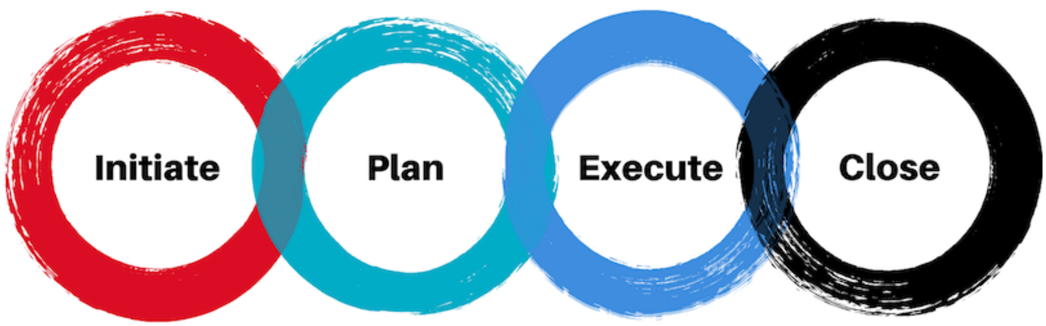
Overview

Project Stages

The following stages are typically used on projects:



Initiate: Involves upfront work to determine the feasibility and value of the project, identifying requirements, and project kick off.

Plan: Involves project planning, the development of key project deliverables, and readiness planning.

Execute: Involves testing, final readiness assessments, and go-live.

Close: Involves identifying project lessons learned and the initiation of change sustainment activities.

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The Change Management Framework

The Change Management Framework is comprised of the following categories of activities:

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The Change Management Matrix

		Initiate	Plan	Execute	Close
Analysis	Audience Analysis	○			
	Stakeholder Network / Map	○			
	Detailed Change Impacts			○	
	Change Impact Summary			○	
Commuinications	Communications Roadmap		○		
	Detailed Communications Plan	○	○		
	Stakeholder Engagement Plan				
	Communications At-a-Glance	○	○	○	○
	Placemats			○	
Training	Training Requirements		○	○	
	Training Design		○		
	Training Content Development			○	
	Training Development Strategy		○		
Readiness	Readiness Checklist			○	

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Analysis Tools & Templates

The following tools and templates are commonly used to support analysis related activities as part of the Change Management Framework.

Tool	Purpose of the tool
1. Audience Analysis	Identify the impacted audience, roles within departments, demographics, and headcount.
2. Stakeholder Network/Map	Identify the various categories of stakeholders, define the roles and responsibilities that each category will play throughout the change journey.
3. Detailed Change Impacts	Articulate the change between current and future state and provide messaging about change for both training and communications.
4. Change Impact Summary	Provide a high-level summary of change impacts captured in the Change Impact document.

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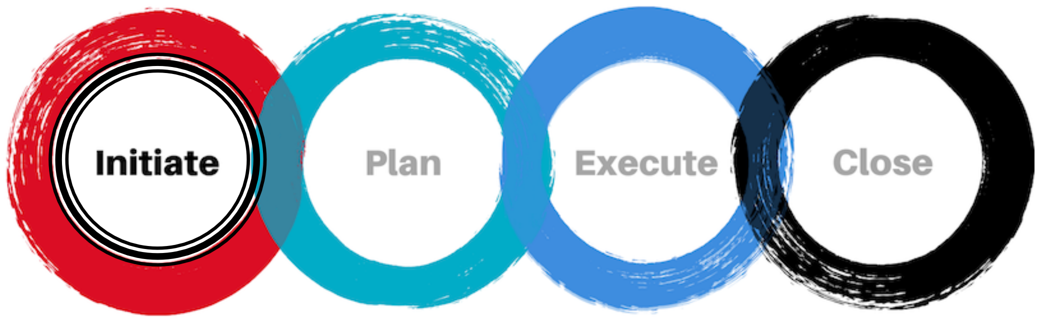
1. Audience Analysis



Development Timing

The Audience Analysis template is typically developed and completed within the Initiate stage of a project to leverage the information for the development of other change management related deliverables.

Development Sources

HR database feeds typically provide a good source of audience information for those who will most likely be impacted by a major change initiative, as they usually maintain current employee data.

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When creating an Audience Analysis, it is helpful to partner with the Project Team to validate target audiences impacted by the change effort. This will ensure that the Change Management Team pulls the correct audience related information from an HR database. The Project Team can also be instrumental in validating information used to build the Audience Analysis.

Information Use

Information within the Audience Analysis tool provides the audience with information that is needed to build many other change management deliverables, such as:

- The categories of stakeholders within the Stakeholder Network/Map that need to understand their roles in order to support change.
- The key stakeholders that need to be routinely engaged, coached, and educated within the Stakeholder Engagement Plan to enable their ability to support the change initiative.
- The key stakeholders who are impacted by change within the Change Impact and Change Impact Summary templates.
- The target stakeholders or end users who will require communication about the change initiative.

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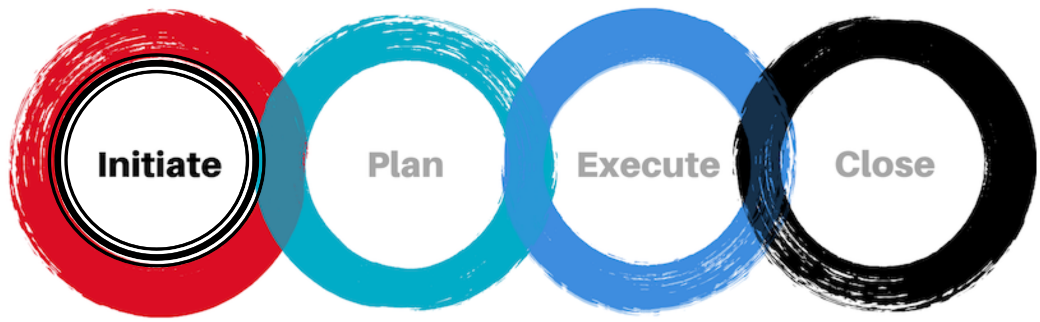
2. Stakeholder Network/Map



Development Timing

The Stakeholder Network/Map is typically developed and completed within the Initiate stage of a project and sets the stage for understanding categories of key stakeholders and their required roles and responsibilities in supporting the change initiative.

Development Sources

The Change Management Team should invest time in partnering with the Business or Project Sponsor to identify and confirm the major categories of stakeholders that make up the overall stakeholder network. Additionally, the Business or Project Sponsor can be instrumental in validating the roles

"..the Business or Project Sponsor can be instrumental in validating the roles and responsibilities assigned to each of the stakeholder categories.."

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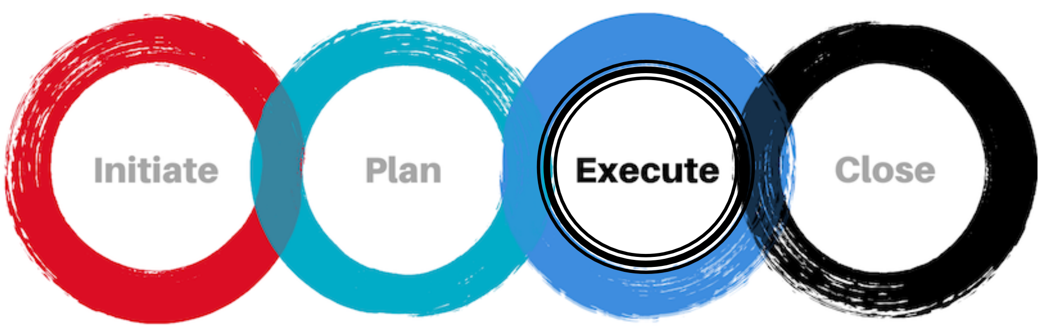
and responsibilities assigned to each of the stakeholder categories in supporting the change effort.

Information Use

The stakeholder network information is valuable in conveying support expectations to each stakeholder group. Not only is it useful in helping to communicate the actions that each stakeholder group can take to actively support the change initiative, but it also demonstrates the important role that change management plays in the overall project. The information contained within the network template can be reused to educate each stakeholder group on the role they play in supporting change all throughout the change initiative through various stakeholder engagement presentations and ongoing communications.

3. Detailed Change Impacts



Development Timing

Detailed Change Impacts are typically developed and completed within the Execute stage of a project. Because the execute stage of a project is usually devoted to defining future state processes and designing new systems, the impacts on people, process and technology can more easily be identified for targeted end users.

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Development Sources

Three main sources can be considered when developing the Change Impact template; People, Project Collateral, and Project Activities.

People

Project Team members with technical or system knowledge or those with subject matter expertise in processes can be valuable resources in helping to provide comparisons between current and future state technologies and processes. Additionally, a Business or Project Sponsor can help articulate expectations regarding future state that can be compared to the current state as it relates to current technology and processes. This type of information can also be translated into change impacts for specific audiences.

"Because it involves a great deal of detail, the review and validation time for this template may need to occur over several meetings."

It's important to provide ample time in the development cycle of this deliverable to allow for review and validation of the information contained within this template. Because it involves a great deal of detail, the review and validation time for this template may need to occur over several meetings. Be sure to set that expectation with the Project Team and Business or Project Sponsor in advance.

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Project Collateral

There are various types of project collateral that can provide the Change Management Team with change related information that is valuable in developing the Change Impact template. For example, the Business Requirements document provides information about what is needed for the future state regarding technology. That information can be compared with current technology to articulate change. Another example of a useful document is business case information, which provides the rationale for the change initiative. This type of information can also be used to translate into change impacts. Additionally, Technical Committee presentations often provide rationale for the change initiative as well as current and future state descriptions as a result of implementing technology, which is also useful in developing the Change Impact template.

Project Activities

One of the most useful activities for identifying change impacts is the technical design session. A design session is usually devoted to designing a new system based on business requirements. The design session helps define the future state of a system for specific users, which provides insight into the expected system and related process changes as compared to the current state.

Information Use

Detailed Change Impact information is extremely helpful in communications and training, as it provides information to help articulate the benefits of the change. It also helps provide information that is critical in setting change expectations with impacted end users so that they have a clearer understanding of what is changing and what is staying the same. Having the ability to use change impact

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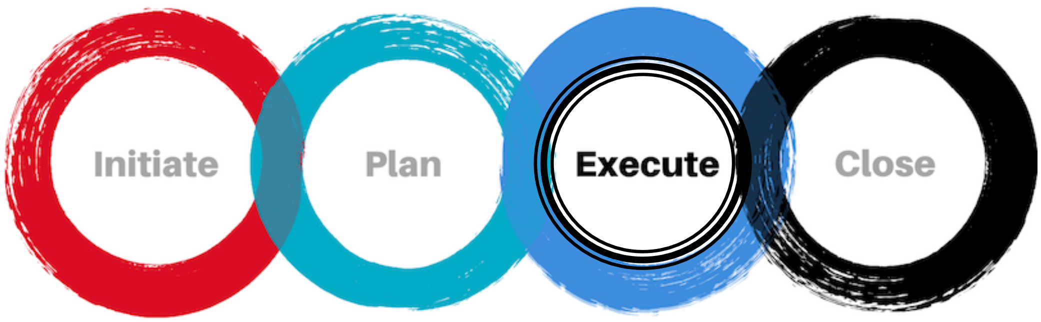
information in both communications and training is critical to building understanding, buy-in, and commitment to change.

4. Change Impact Summary



Development Timing

The Change Impact Summary template is also developed and completed during the Execute stage of a project and is useful in summarizing and presenting the detailed changes captured as a result of the change initiative.

Development Sources

The Detailed Change Impact template is the primary source of information used when developing the Change Impact Summary template, as it provides the targeted audiences impacted by the change, as well as the processes, steps, and technologies that are affected for each audience. Additionally, the Project Team can be useful in providing validation to the tasks that are affected by change for each audience group.

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Information Use

The Change Impact Summary template serves as an excellent educational tool, as it is useful for presenting change impacts to various audiences, particularly those who are defined within the Stakeholder network and executives. Unlike the heavy detail comprised in the change impact document, it displays the change impacts by process area and by audience at a high level, helping various stakeholders to have a better understanding of how change is affecting the organization.

"…develop communications that speak to fear of change, and ultimately convey messages that speak to the benefits of change…."

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Communication Best Practice Tips

Knowing and Communicating with your Audience

When developing communications for the various audiences to be addressed regarding the project, it's important to take the following into consideration:

- Understand the different levels of audience to be addressed by the communications plan.
- Use language appropriate to address various audience levels. For example, there may need to be a difference in tone and information for the executive level communication as opposed to the staff level communication.
- Use language that is common within the culture and avoid the heavy use of project-related language.
- Use consistent terminology with the various audiences being addressed to avoid confusion.
- Try to understand audience concerns when developing communications. This will help to develop communications that speak to fear of change, and ultimately convey messages that speak to the benefits of change and are positive and encouraging.

Using Different Communication Vehicles

The use of different communication vehicles increases the likelihood that project related communications will reach

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various audience levels. Some example of communication vehicles that are typically used in projects are:

- In person meetings
- Town hall meetings
- Conference calls
- WebEx presentations
- Portals or in-house websites
- SharePoint sites to house communications
- Flyers or posters
- In house voice mails
- Open house events
- Newsletters
- Videos
- Email

These communication vehicle types can be incorporated into the Communication Roadmap and the detailed Communications Plan to add variety to communications distribution for various target audiences.

Some questions to ask when determining communication vehicles

- What has typically worked well in distributing communications in the culture?
- What are the communication types to avoid?

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- What technologies are in place to support the distribution of communications?
- Who can the Change Management Team partner with to support the distribution of communications?
- What type of communications infrastructure is currently in place that the Change Management Team will be able to piggyback on?
- What types of communications do various audiences typically like to receive?
- Are there other, numerous communications occurring during the same timeframe to the same audience as the planned communications for this project? Can these messages somehow be bundled in an effort to avoid communication overload?
- Based on the recipients, what is the best mechanism to receive communications?

Roles in Communications Development

A Communications Lead is typically assigned from the Change Management Team to take the lead in communications planning, development, and deployment. The Communication Lead can work with the following roles in the communication development process.

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Business or Project Sponsors	Project Team Members
• Provide input for key messages • Provide guidance on building a connection between the organization's strategic direction, values, and the overall project • Approve Communications Plan • Provide timely communications review and sign off as necessary • Assist in resolving communication issues • Assist in delivering communications as appropriate	• Provide subject matter expertise for content as needed • Provide timely review and feedback of communication content • Assist in resolving communication issues • Assist in delivering communications as appropriate

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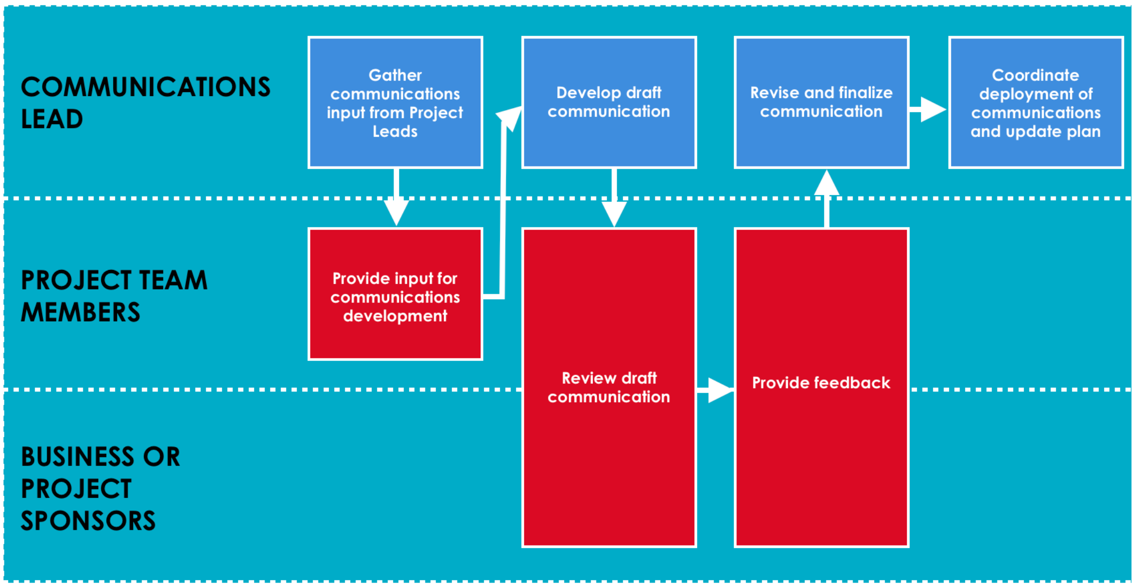
Communications Process

The following process is commonly used to involve Project Team members and Business or Project Sponsors in the development, review, approval, and deployment of communications throughout the project.



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Communications Tools & Templates

The following tools and templates are commonly used to support communication-related activities as part of the Change Management Framework:

Tool	Purpose of the tool
1. Communications Roadmap	To plan and create an initial map/timeline of communications by audience level. This tool creates the basis for what is entered into the Detailed Communications Plan.
2. Detailed Communications Plan	Document and manage all project related communications by the audience.
3. Stakeholder Engagement Plan	Plan activities to engage specific stakeholders throughout the change process.
4. Communications-at-a-Glance	To provide leadership with advance, consistent, high level communication updates.
5. Placemats	To gear leaders and Project Team Members with the tools needed to champion the project and its associated changes.

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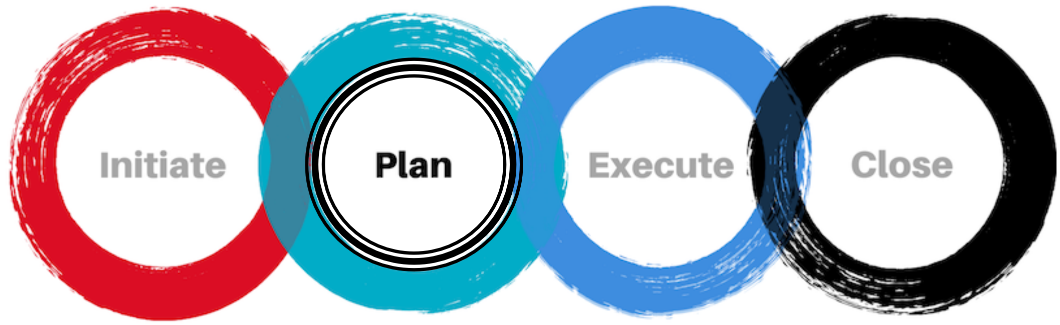
1. Communications Roadmap



Development Timing

The Communications Roadmap template is typically developed and completed during the Plan stage of a project, as it helps to set the stage for potential communication topics by audience and month in conjunction with major project activities and milestones that are usually defined within a project plan by the Analyze stage.

Development Sources

The project plan is an important source to leverage when determining the topics by month for a Communications Roadmap, as the project plan specifies the dates for key

"...the project plan specifies the dates for key milestones that will potentially impact end users of the new system and new processes..."

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milestones that will potentially impact end users of the new system and new processes as part of a technical implementation.

The audience analysis and stakeholder network offer helpful information on the audiences that will require communication throughout the project. Based on the type of stakeholder and impact, the Change Management Team can determine the types of topics and education required within the roadmap.

The Project Team can be useful in validating the topics by audience and month based on their knowledge of project activities and timeline. A Business or Project Sponsor can also be instrumental in validating suggested topics by audience and month within a proposed roadmap.

Information Use

The Communications Roadmap is useful for having a high-level view of communication topics, by audience and by month, in conjunction with major project activities. It provides a 'big picture' view of what each of the key stakeholder groups will be receiving in terms of communication over time and helps to gauge whether or not topics are helping to drive stakeholders through the stages of change over time. The content within the roadmap can be used to provide leadership and executives with a high-level view of communications to the organization for the change effort, as is the case with the Communications-at-a-Glance template. The content is also used as the basis for developing the Detailed Communications Plan.

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2. Detailed Communications Plan

Development Timing

Development of the Detailed Communications Plan typically starts in the Initiate stage of a project and extends through the Plan stage. This is because the Plan stage provides additional detail regarding change, which is when critical information needed to communicate greater detail about current versus future state differences and benefits, can be gathered. Completion of the Detailed Communications Plan usually happens within the Plan stage, although the Change Management Team may find that throughout the duration of the project, shifts in milestone dates and potential delays to go live activities may require changes to the details of the communications plan.

Development Sources

The information developed at a high level within the Communications Roadmap is the primary information used to build the more detailed content in the Communications Plan. The Change Management Team has the primary responsibility of managing the content and changes to the plan. Ad hoc communication needs may arise throughout the duration of the project, and those types of communications can be captured and managed within this template.

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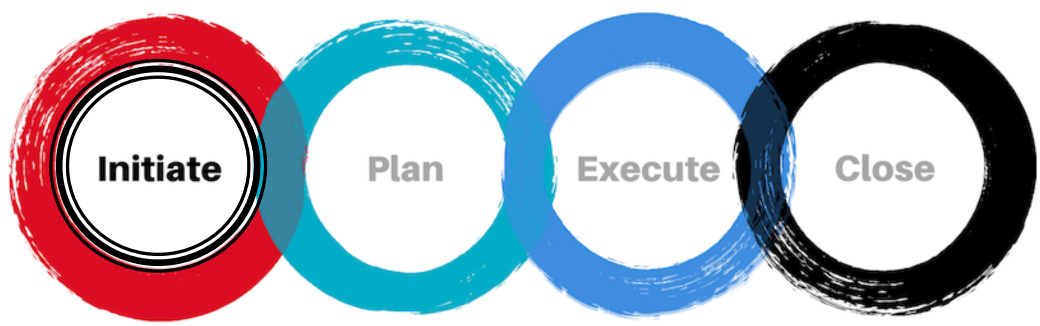
Information Use

The Detailed Communications Plan is used to ‘project manage’ all communications planned for the project. The Change Management Team will need to rely on the components of the plan to help track when messages are due so that they provide adequate development, review, and approval time that supports the timely deployment of messages to stakeholders. The team will also need to leverage this tool to identify in advance those who will be responsible for sending or distributing specific messages to target audiences.

3. Stakeholder Engagement Plan



Development Timing

The Stakeholder Engagement template is typically developed and completed during the Initiate stage of a project, as it sets the stage for how the Change Management Team will engage or interact with specific stakeholders in order to provide education and build support for the change initiative over time. Because it is developed early in the project, it helps to educate key stakeholders in advance on how much of their time may potentially be needed for education on the project and coaching on how to support the various stages of the change initiative with their staff or employees.

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Development Sources

The Stakeholder Network is a useful source in developing the Stakeholder Engagement Plan, as it provides the audience or stakeholder categories that will require consistent engagement to help make the change journey successful. Having insight to the Communications Roadmap is also helpful when creating this template, as it provides insight to the communication topics that targeted stakeholders will receive, providing the Change Management Team a sense of what topics they can reinforce through stakeholder engagement activities.

"The plan should help drive the Change Management Team to devise opportunities to gain insight and information from stakeholders..."

Business or Project Sponsors can be useful in helping to validate the education topics, coaching topics, and discussion points that are typically part of the Stakeholder Engagement Plan. As sponsors often have insight as to where key stakeholders or leaders are in the change journey and can provide guidance to the Change Management Team on how to adjust the plan to meet stakeholder needs.

Information Use

The Stakeholder Engagement Plan should be leveraged as a guide to develop materials that will be used to engage, educate, and coach key stakeholders who will play a critical

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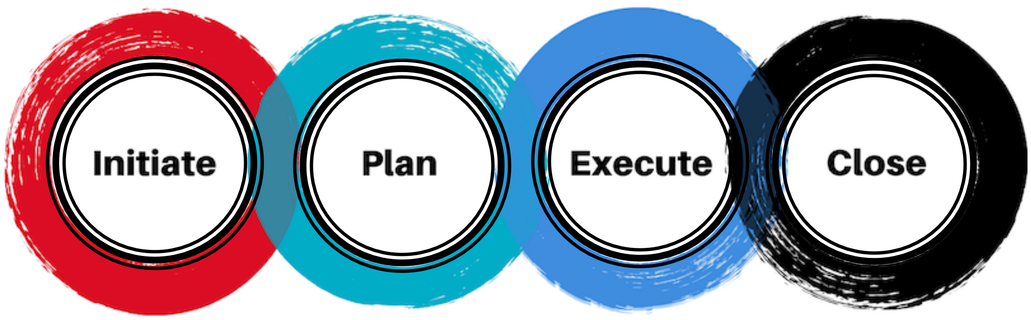
role in helping to support and facilitate change. The plan should help drive the Change Management Team to devise opportunities to gain insight and information from stakeholders about end users through discussion and other activities. The Change Management Team will need to use the plan to develop engagement materials and schedule activities.

4. Communications-at-a-Glance



Development Timing

The Communications-at-a-Glance template can be developed and deployed throughout all stages of a project and helps provide high-level, communication overviews for various audiences.

Development Sources

The Detailed Communications Plan is usually the best source to use when creating a Communications-at-a-Glance template, as it contains the most up-to-date communication information for all audiences.

Information Use

The Communications-at-a-Glance template should be deployed to managers and above of the end user community to keep them informed of the ongoing project related communications that their staff or employees will

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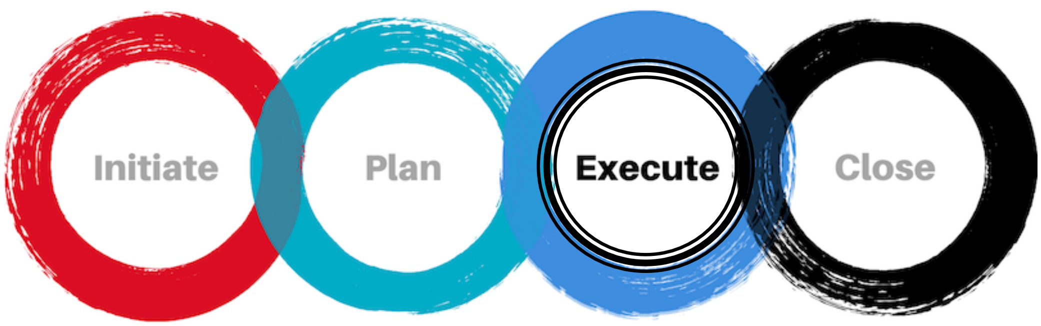
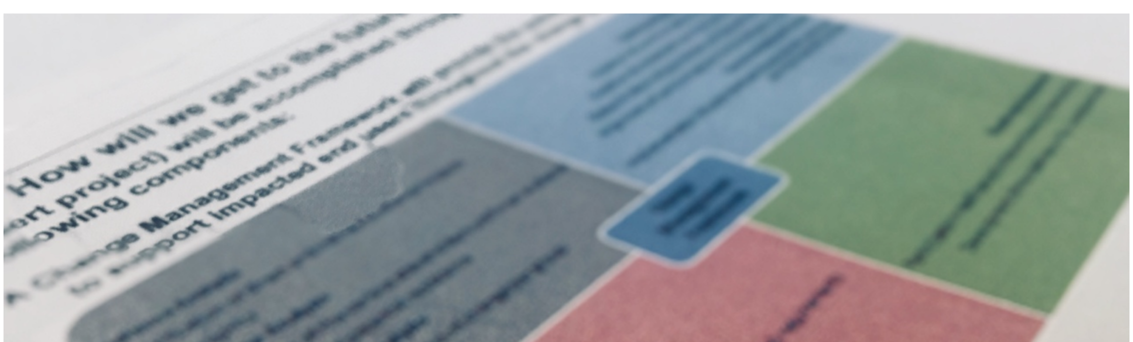
receive in four-week increments. The tool is an effective way to quickly, and easily display a four-week window of communications without all the heavy detail in the Communications Plan. Using this template will ensure that managers and above are well informed regarding communications and should position managers and above to better field any project related questions that may come from impacted end users.

5. Placemats



Development Timing

Placemats are typically developed and completed during the Execute stage of a project, as greater detail and information regarding the project, which is useful when developing the placemat, can be gathered at that time.



"The placemat is a very effective tool for leaders and managers to use in being able to convey the 'story' behind the change initiative..."

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Development Sources

Project collateral, such as presentations, business case information, and change impacts all provide good information regarding the rationale for the project, the benefits for the change, the expected results, and the change impacts, all of which can be incorporated into telling the 'story' for the change initiative.

A Project Lead and Business or Project Sponsor can help validate the information contained within the placemat.

Information Use

The placemat is a very effective tool for leaders and managers to use in being able to convey the 'story' behind the change initiative to staff or employees being affected by the change. It provides those stakeholders who need to support the change effort with a communication tool to explain the change effort in a consistent manner so that all impacted end users are receiving the same project related information. It is also an effective tool for executives when providing a high-level description of the project.

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Training Tools & Templates

The following templates are commonly used to support training related activities as part of the Change Management Framework.

Tool	Purpose
1. Training Requirements	Identify the critical tasks by category and track their completion as criteria prior to Go Live.
2. Training Design	Identify the courses/modules by audience and course duration.
3. Content Development	Develop the training content in preparation for end-user training.
4. Deployment Strategy	Identify the schedule of training and duration by audience; identify and secure training resources and train-the-trainer activities.

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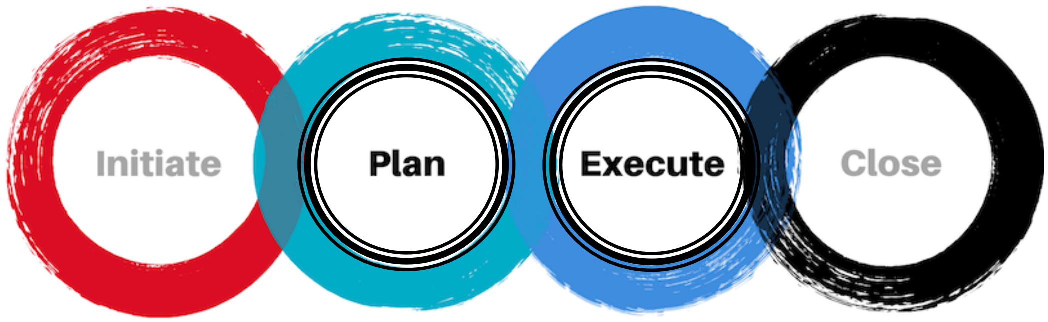
1. Training Requirements



Development Timing

Training requirements are typically started during the Plan stage and finalized during the Execute stage of a project. In the case of technical implementation projects, the design and testing of new technology typically happen around this

"…this timeframe provides insight to the types of skills and content that various users will require."

period of time. With an understanding of technical design and functionality during the Plan stage, along with access to a training environment to capture screenshots of step by step tasks during the Execute stage, this timeframe provides insight to the types of skills and content that various users will require. For non-technical related projects, such as business process changes, workforce related efforts, etc.; this timeframe

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provides enough detail to identify training requirements for impacted audiences.

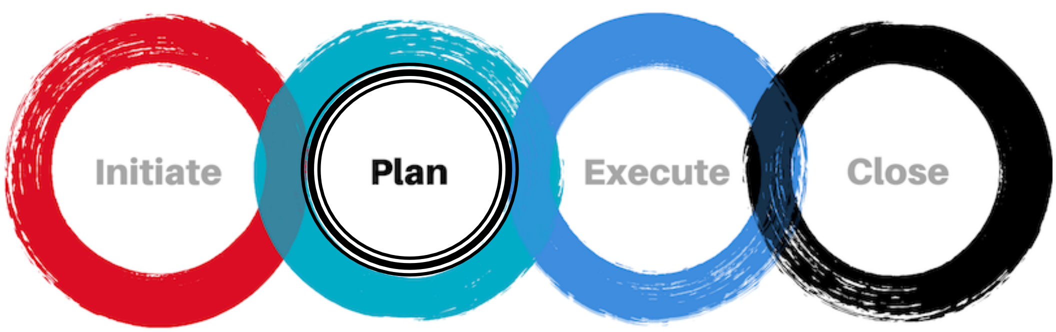
Development Sources

Documents such as business requirements, business process flows, and change impact information all serve as good sources to identify training requirements for all impacted audiences and inform the type of content required for development.

Information Use

The information contained within the training requirements document is useful for socializing and gaining approval on potential training collateral prior to content development. It provides a document that can be used for input by various stakeholders or subject matter experts to ensure that all requirements are captured and reflected in the actual training design and content.

2. Training Design



Development Timing

Training design is typically completed during the Plan stage of a project. The training design document should describe how the training will look once it is developed. The type of training vehicles to be used, the duration of the training, the

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audiences, and the timing of delivery are typically addressed in training design.

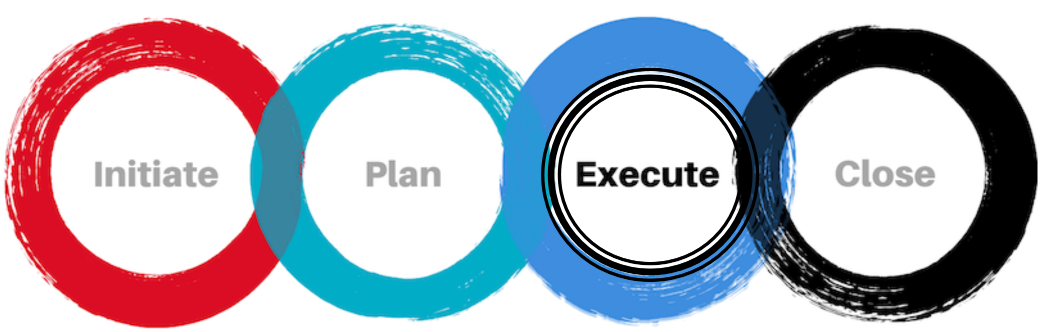
Development Sources

The training requirements document includes the information needed to develop the training design. The breakdown of requirements provides the information needed to structure training activities for each impacted audience. Based on the skill requirements defined, the training requirements document also serves to inform on the best training delivery methods for each audience.

Information Use

The training design document is an effective tool for validating the training approach and potential content with subject matter experts. It also can be used to update leadership on training direction and set expectations for the type of content and delivery.

3. Content Development



Development Timing

Training content development is typically finalized during the Execute stage of a project. In the case of technical implementation projects, access to testing outcomes, and software support content development.

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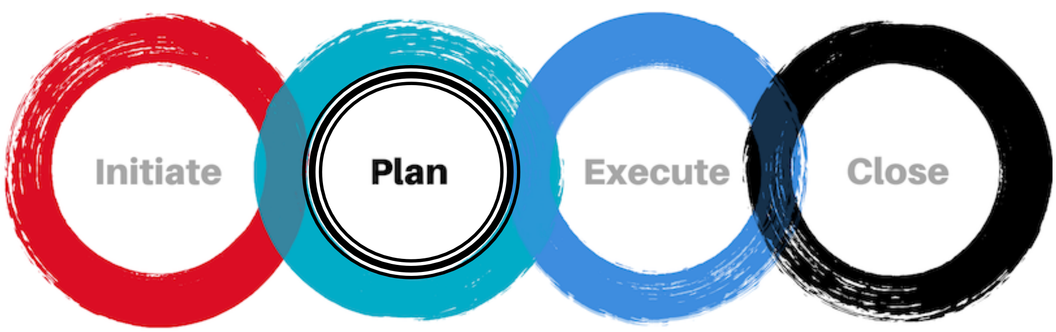
Development Sources

The training requirement and design documents provide the basis for developing the various types of training content defined. In the case of technical implementation projects, the actual software that is being implemented can be used for the purposes of creating training videos, capturing step by step screenshots or for basic navigation.

Information Use

The training content is packaged and delivered to audiences per the design specifications. Content should be reviewed and approved by individuals assigned with approval responsibility, such as subject matter experts, or business owners/sponsors.

4. Deployment Strategy



Development Timing

The training deployment strategy can be developed during the Plan stage of a project, as it should be a reflection of what is captured in the training design. It often includes information on the required training resources, and the approach for preparing them, such as the use of a train-the-trainer activity. The training deployment strategy should describe how and when each training module by the

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audience will be delivered. The schedule and duration of each course should be defined.

Development Sources

The training design document serves as a basis for developing the schedule, duration, and audience for each course. Content development can be used to confirm the accuracy of training duration for each course developed. The training design and content documentation can also be used to determine the approach needed for delivering train-the-trainer activities.

Information Use

The training deployment strategy can be used to set expectations with leaders and other key stakeholders on how and when training will be delivered throughout the organization. It can also be used to support training related communications to both training resources and potential attendees.

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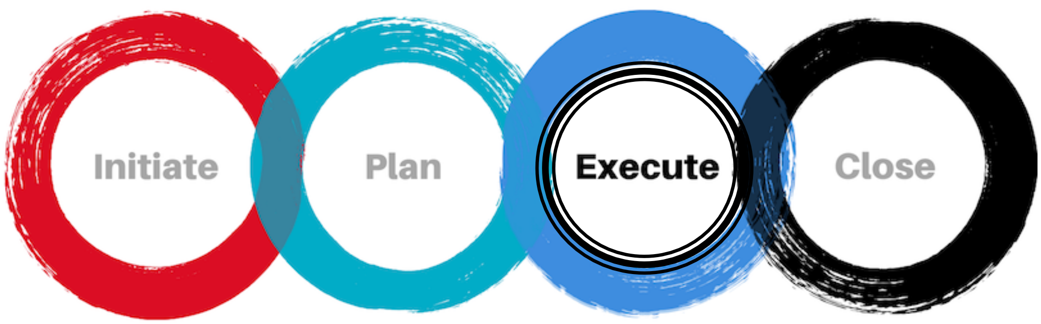
Readiness Tools & Templates

Tool	Purpose
1. **Readiness Template**	**Identify the critical tasks by category and track their completion as criteria prior to Go Live.**



Development Timing

The Readiness template is typically developed and completed during the Execute stage of a project, as it serves to ensure that the right questions are asked regarding the completion of required activities prior to go live.

Development Sources

The Change Management Team will need to partner with the Project Team in the development of the Readiness template. The Change Management Team will need to develop a list of business and people tasks, and questions related to those tasks that require completion prior to go live. The change management activities listed in the project plan can provide a foundation to create these tasks and questions. The Project Team should be asked to validate those tasks and should

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contribute to other areas and categories in the overall completion of the Readiness template.

Information Use

The Change Management and Project Team members should partner together on the use of the Readiness template anywhere from six weeks prior to go live to two weeks prior to go live, assessing the completion of required tasks in order to ensure readiness and the ability to transition to go live. The Change Management Team should proactively use the tool to identify risk to readiness in the areas of business and people and use other change management interventions, such as communications, to mitigate risks.

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An essential resource for every professional leading or managing change within their organization.

Corinne Sinnigen is a proven industry leader who has laid out the fundamentals of change management activities in an actionable format. Corinne has the unique ability to organize complex topics in a way that every professional will find easy to understand.

Change is inevitable. Even the best changes can create chaos if they are not managed and communicated effectively. Leading a change initiative properly requires a methodical approach, effective tools, and the ability to stay on course. This resource helps you accomplish all of this with proven results.

Whether your organization is changing for the first time, or in a constant stage of evolution, this will be a tool you will want at your fingertips.

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