

A Human Focus on Change Management

In Higher Education

Agenda

- Welcome, Introductions
- CAUBO Survey on Change Management
- Change Management in Perspective
- Your Change Management Toolkit

Background

Heather Woermke CA, CPA
Controller, Queen's University

Change Management Experience

- Major ERP Implementation
- Departmental Reorganization
- Travel and Expense Automation (Concur)
- New Policies and Procedures
- e-Procurement (SciQuest)

Robert Poole CA, CPA, M.Eng. PMP
Change Management Consultant

Change Management Experience

- Industry Canada, Superintendent of Bankruptcy (updated legacy system)
- New Policies and Procedures
- Travel and Expense Automation (Concur)
- Physical Plant Services – Work order automation (Archibus)
- Smith School of Business – Room and resources booking system (EMS)
- e-Procurement (SciQuest)

CAUBO Change Management Survey

Summary of Results:

What was Surprising:

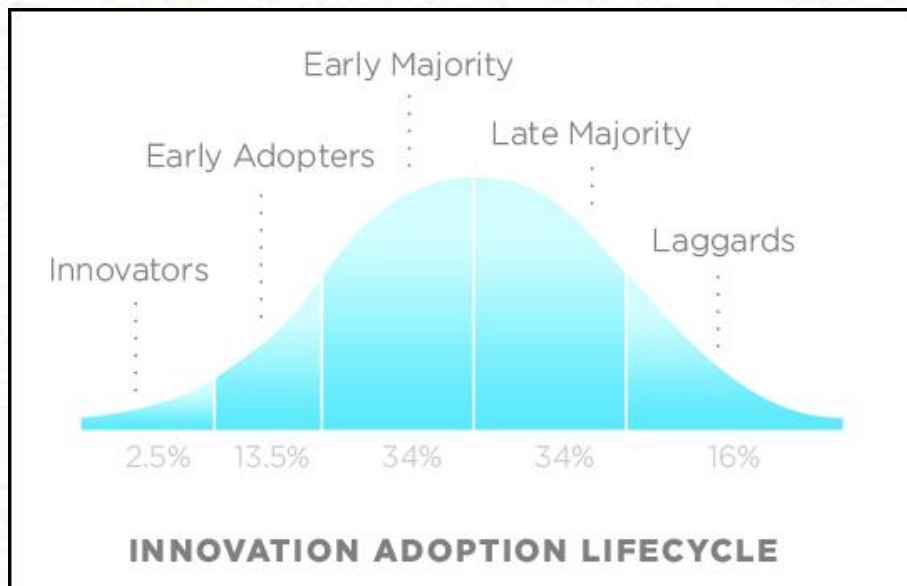


Change Management in Perspective

- Change management is a human-centric activity
- Happening everywhere, all the time
- Driven by uncontrollable internal and external factors
- A good perspective (episodic) vs. the best perspective (ongoing)
- Marathon with many hurdles
- Face time is key – meet early – meet often

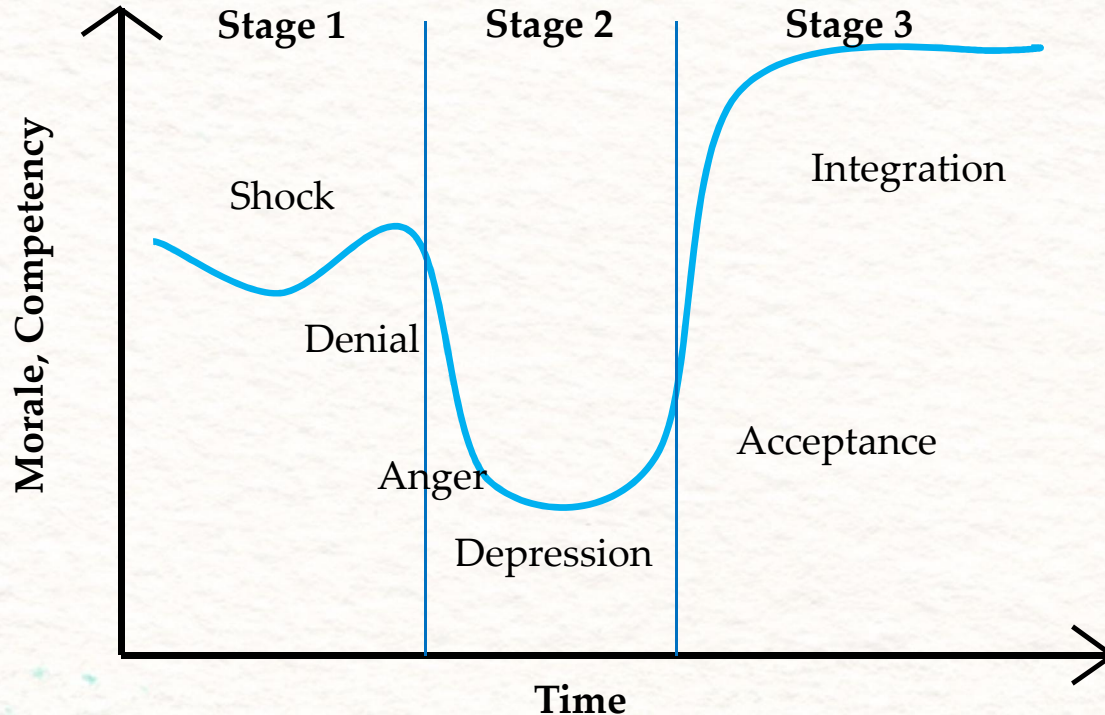
Your Change Management Toolkit:

Innovation (Technology) Adoption Lifecycle



- Help Yourself – You won't convince everyone at first – many repeated actions – each time converting more people
- Help Them - Understand that not everyone adopts at the same rate
- Where does the individual(s) fit in this lifecycle?

The Change Curve

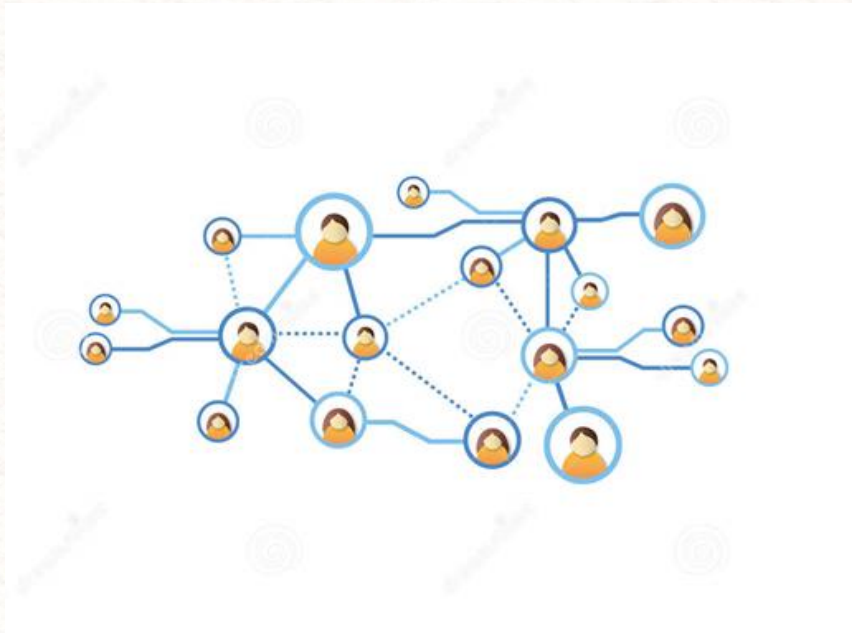


- Stage 1: Lack of information, fear of the unknown, fear of looking stupid or doing something wrong
- Stage 2: Suspicion, skepticism, frustration
- Stage 3: Excitement, relief – survived, impatience for the completion of the change

1: Bring the Outside In and the Inside Up

- Global trends and forces are at play
- Remind them that work they do has meaning to other people
- What are effective motivators for the individual?
 - Quality research
 - Teaching and student success
 - Learning Environment
 - Student/staff safety
 - Institution/Faculty – Reputation, brand
 - Efficiencies – processes, people, financial

2: Find the Nodes in the Network



- Different stakeholders have different types of influence
- Useful for identifying targets for specific change initiatives

3: Show Them Some Happy Successful People

- Find early adopters and lead (influential) users
- Bring external validation (credibility)
- Look for enthusiastic people when you start the change management (face-to-face engagement) process
- This is one of the reasons why you start early
- Find success from peer institutions who have completed the same change

4: Be Prepared to Walk Your Talk

- You must be able to back up what you say by showing that it's true
- Applies mostly to new systems/technologies

5: Target Assumptions NOT Opinions

- All opinions are valid (even if they're wrong)
- You can effectively change the assumptions that opinions are based on
- Opinions are based on sets of assumptions
- You cannot win an argument of opinions
- Changing minds happens one assumption at a time

6: Maintain Empathy but Don't Let it Get Personal

- You must be operating from a position of personal strength
- Can require massive amounts of control and patience
- You will need to be rested and ready (emotionally)
- Tag-team approach can work well

7: Do NOT Get into a Debate about “Downloading”

- “Downloading” debate does not yield a win-win result
- Focus on the reasons for the change and bring the outside in
- Reality: Technology naturally results in “downloading”
 - ATM machines
 - Self-serve checkout
 - Coke Freestyle Machine

8: Develop a Script and Stick to It

- Be clear on your strategy and outcomes from the encounter
- Have speaking notes and be sure to cover them
- Executing an effective Change Management plan will give you the messaging that will resonate with your specific audience
- Have a strategy for dealing with legitimate concerns and/or problems with the change initiative
 - Meet separately face-to-face to fully understand and to come up with an action plan

9: Expect to Encounter Persistent Naysayers

- You must be able to respond to unreasonably and persistently negative people
- Frame the criticism as a valid opinion
- Show empathy
- Move on
- Build a list of formerly negative people who changed their opinion
 - From the current or previous change initiatives
 - From peer institutions who have completed the same change

10: Create a Change Management Machine

- Build bench strength in your team
- Make it a core competency and part of every interaction with stakeholders
- Communicate all relevant messaging to your team and make sure they know it and can communicate it
- Interactions with stakeholders (good and bad) = opportunities to drive change

Quote

Change is the law of life, and those who look only to the past or present are certain to miss the future.

John F. Kennedy

Questions?

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The background of the slide is a soft, watercolor-style wash of teal and green hues. The colors are blended together, with some areas appearing more saturated than others, creating a textured, artistic effect. The word "Thanks" is centered in a black, serif font.

Thanks