

# Learning Tree Management Insights

Expert Advice from Today's Top Professionals

## Five Steps to Get People Engaged in Organisational Change

- **Bob Black**, *organisational change management consultant*

### The challenges of implementing change

An organisation's project team was planning an organisational change that involved the roll-out of a new integrated logistics process that would affect many of the jobs in the company across multiple departments. The team had all their process charts ready, the equipment ordered, and the plan "up on the wall". Everyone was looking forward to the start date, just three weeks away. I was asked to review the team's plan as part of the project's due diligence "Go Live" process.

What I found was a classic case of the project team getting caught up in the process, or "administrivia," of planning, but missing what is crucial for any successful change: the people-focused actions that lead the affected parties to take personal responsibility for the success of the project and their part in it. About eight weeks earlier, the departments affected by the changes had been given a generic roll-out briefing. However, there hadn't been much contact with them after that. Even more worrisome was that little or nothing had been done to keep the stakeholder and stakeholder groups up to date with the project's progress. Furthermore, not surprisingly, there was no plan to keep the departments engaged as the project continued.

This wasn't unusual: there is often an imbalance between the focus on process and the focus on people in organisations attempting to implement organisational change; organisations almost always prioritise "process issues" above "people issues". Most organisations are reasonably good at ironing out the kick-off issues, but lacklustre, at best, when it comes to gaining and sustaining people's engagement over the life of the project. A strategic approach to communicating and keeping affected people engaged is critical to achieving change. That approach includes a plan that operates over the life of the project and reflects the different stages of the change implementation cycle.

### Gaining Engagement

When I pointed out the imbalance to the project team and their senior management they were, of course, initially embarrassed, and pushed back at my feedback. However, they moved through that phase quickly and adjusted to gain a sharper, more balanced focus. I recommended that the team adopt a five-step process for engaging people in the proposed change:

1. Create a change plan that addresses both people and process
2. Perform a time-sensitive stakeholder analysis
3. Get involvement early and have a plan to maintain the engagement when times get "interesting," i.e., tough!
4. Plan to manage conflict
5. Engage through communication

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The project team's new goal was simple: to get out the message of why the change was needed and what the benefits were. Working through the five steps, the project team set up a series of face-to-face meetings attended by the lead project managers and the senior management of key departments. They were able to describe the benefits of the change in personal and individual terms, and answered the key question: "How will this change affect me?" And, with that answer, effective engagement began.

The project team also recognised that their initial effort wasn't enough—they had to continue communicating. They were constantly surprised at how many people hadn't gotten the message, even after the project team spent considerable time and effort communicating it. They were also surprised at the many different interpretations stakeholders had of what the change actually was. By constantly engaging the stakeholders and adjusting the message over time, the team was able to maintain the stakeholders' commitment through the life of the project. In the end, everyone in the organisation was involved in the project's success.

### The Five-Step Plan for Building Engagement

I always ask a "golden question" when advising organisations how to implement successful change.

The question is this: why is there always a rollback process to stabilise the "process issues" of a change gone wrong, but there is almost never a parallel rollback process to stabilise the "people issues"? The answer is that while it is possible to bring back processes to their pre-change state, it is impossible to turn back people to their pre-change psychological state because people, unlike processes, will always remember what was promised and what was delivered. The five steps outlined below will help your project team get the engagement they need to ensure that they adequately meet the "people issues" that lead to successful change.

### Step 1: Create a change plan that addresses both people and process

When creating a project plan, ensure that it is a balanced one that gives due attention to both people and process. To ensure that balance, begin with the "people issues" then move to the "process issues". When addressing the "people issues," drill down to the individual level in order to establish a strong connection between the planned change and its implications for individuals in the organisation. Answer the question "How will this change affect me?"

### Step 2: Perform a time-sensitive stakeholder analysis

Usually, stakeholder analysis picks out the "Big Beasts"—the key players for the change project. But you must expand the stakeholder analysis to identify how the key stakeholders change over time: those people who are important now, those who will be important in the short to middle term of the project, and those who will become key at the latter stages of the project. In addition, over time the level of detail required by each stakeholder will differ based on the immediacy of their involvement. A time-based analysis allows you to develop an engagement plan that recognises short, medium, and long-term communication requirements for each of the stakeholders.

For instance, you'll need to communicate information to the affected parties about any training plans included in the project. Early in the project, this plan will be "of interest only" to the affected parties, so the communication should be at a very high level. As the project gets closer to final implementation, the content and practicalities of the training plan will become more important to the parties involved. The type, style and content of communication should change accordingly.

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### Step 3: Encourage early involvement

Early involvement of all affected parties is vital to increasing the engagement of the individuals involved. The more people are involved, the more opportunity there is for getting their emotional buy-in, which in turn affects their motivation for the changes required to support implementation.

An example of this is the initial “Change Vision” (or “Mission” or “Project Brief”). Often the vision is created by a “select few” and then spread throughout the organisation without the involvement of the “affected many”. It’s tempting to take for granted the agreement and adoption of the vision by the “affected many”. That assumption ensures that you won’t get the engagement you want. Involve the affected parties early by including them in the development of the vision.

### Step 4: Plan to manage conflict

There’s nothing wrong with conflict—in fact, conflict is inevitable. What happens when conflict occurs determines whether you get a positive or negative outcome. The project team must agree on how they will deal with conflict during the life of the change implementation, both inside and outside the team. This discussion often doesn’t occur because of “optimism bias,” the belief that things “will be better this time” despite the evidence of conflict in all previous projects.

### Step 5: Develop engagement through communication

Finally, you must ask for feedback from the affected parties at every stage of the project. When you do receive feedback, you must let everyone know what is happening with the feedback (even if your response is “we’re thinking about it” or “we’ve thought about it, we’re not going to do it, and here’s why”).

By following these five steps, you can greatly increase the chance that the people who are affected by organisational change feel engaged and positive about your project.



### About the Author

**Bob Black** is author of Learning Tree’s Course 288 “Achieving APMG Change Management Practitioner Certification” and Course 341, “Negotiation Skills for Tough Situations: Tools and Techniques That Deliver Results.” He is a Certified Change Management Practitioner and Trainer and a Fellow of the Institute of Information Training. Bob is a principal with “People Skills Organisational Development Consultancy,” specialising in organisational change management and the use of project management as an agent for change.