

A Complete Guide to Change Management

All you need to know for seamless
change management.



What is Change Management?

Change management is the catch-all term for all the ways of preparing, supporting, and helping teams, individuals, and organizations undergo change.

There are various causes for change, including:

- Evolution of technology
- Internal process reviews
- Crisis response
- Customer demand changes
- Competitive pressure
- Acquisitions and mergers
- Organizational restructuring

Such change might include redefining and/or redirecting budgets, resources, business processes, and operations in general. Change management usually only refers to how personnel and teams are affected by changes within the organization, whereas organizational change management (OCM), is about the total organizational change of an entire company or business.

[The Association of Change Management Professionals \(ACMP\)](#) defines change management as:

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The practice of **applying a structured approach** to transition an organization from a current state to a future state to achieve **expected benefits**.



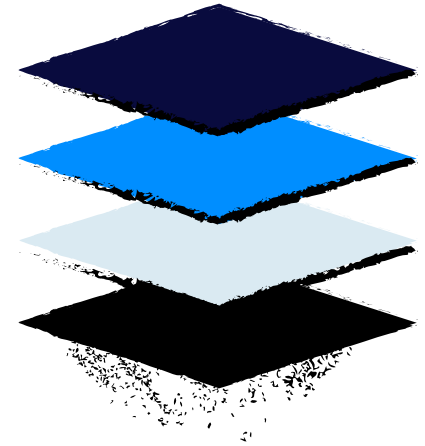
Change management provides this direction with specific actions that can be taken to influence and support people in their individual transitions.

There are three forms of change management:

1 Individual Change Management

2 Organizational/Initiative Change Management

3 Enterprise Change Management



Change Management Strategy

Change for the sake of change is hardly beneficial to a business, as it puts strain on employees and resources. But with a clear strategy and purpose, an organization can make changes that directly benefit the business. Knowing the plan, the characteristics of the change, its risks, and potential resistance makes for a smooth transition for change practitioners, project teams, and partners.



Keep in mind, all change is different and requires a unique approach. Consider these changes:

- Relocating office spaces
- Changes in senior leadership
- Acquiring a company
- Implementing a new web-based form and process

Creating a Change Management Strategy

Use the following steps to guide you through the development of your strategy for change management.

1. Identify Change Characteristics

Start with a list of questions as you prepare a strategy for managing change:

- What is the scope of the change?
- Who is being impacted (employees, customers, others)?
- How many people will be affected?
- How are people being impacted?
- Are people experiencing the change differently?
- What is being changed (systems, processes, roles)?
- What is the timeframe for the change?

Having answered these questions, you'll have a better direction and greater intent behind your plan for change.

2. Assess the Organization

Use the following steps to guide you through the development of your strategy for change management.

Some questions to ask at this phase include:

- ① What is the perceived need for this change among employees and managers?
- ① How have previous changes been managed?
- ① How many changes are currently taking place (internally, or in the world)?
- ① Is there a shared company vision?

3. Create the Change Management Strategy

Successful strategies make sure to include:

Team Structure

This determines who will be doing the change management work and outlines the relationship between the project team and the change management team.

This often involves placing a change manager in a project team, having a centralized change management team to support the project team, and/or assigning change management to a project team member.

Be sure to get specific about responsibilities and resources!

Sponsor Coalition

The sponsor coalition refers to the leaders, managers, and stakeholders who need to be actively involved in leading the change. The main sponsor is of course the individual who authorizes and promotes the change.

This figure will be largely responsible for building a coalition of sponsors throughout the organization.

Choose leaders from groups impacted by the change. Each member of the coalition has the duty of garnering support and communicating the change with their respective audience.



Anticipate Resistance & Special Tactics

When change occurs, there's usually resistance. Often, this resistance could have been anticipated and prepared for accordingly.

When planning change, try to predict potential resistance and reactions by asking these questions:

- ① Are certain divisions or regions impacted differently than others?
- ② Were some groups sharing a different solution to the problem?
- ③ Are certain groups greatly invested in how things are currently done?

Take note of the particular resistance points you might encounter and plan special tactics to deal with them before the process begins.

Risk Assessment

People are always going to be a potentially sizable risk, especially if they're not managed and supported properly throughout the transition.

Certainly, farther-reaching projects have a higher risk level. A critical component of the strategy is documenting the overall risk and specific risk factors.

Consider the change characteristics (small/incremental or large/disruptive) and organizational attributes (ready for change vs. resistant to change) in order to conduct a thorough risk assessment.

Change Management Failure

There are many reasons why change initiatives can fail. Employees may be frustrated with the changes or the management of the change. Customers might not receive the changes well, or there might be confusion around the change. This list will identify more reasons why change initiatives fail and help you ensure that yours will succeed.

Reasons why change initiatives fail:

- There's no explanation as to why the change is taking place
- The change is too big for the time frame
- Bottom-up support for change is lacking
- Change management support is weak
- The initiative lacks inspiring leadership
- Leadership ignores change resistance as a source for learning
- Management pushes too hard and doesn't recognize organizational exhaustion
- The plan is rigid and doesn't adjust to upcoming developments
- The organization's culture is not taken into consideration



Study this list and be prepared to revisit it throughout your change initiative so you can prevent failure, as well as better support your organization and your people through times of change.

Change Management Models

When it comes to the how of change management, there are a variety of models. These provide direction and often simplify the endeavor. Here are 7 of the most widely used models.

Lewin's Change Management

Using the analogy of melting and refreezing an ice cube, Kurt Lewin developed the idea that change occurs in 3 simple stages: Unfreeze, Change, Refreeze.

ADKAR

The ADKAR model focuses on the people, starting with individual change. ADKAR is an acronym for:

Awareness – of the need for change

Desire – to participate in and support change

Knowledge – of how to change

Ability – to implement change

Reinforcement – to sustain change



Kotter's 8-Step Change Model

After a survey, John Kotter developed this model that looks more at those involved in the change rather than the changes themselves.

The 8 steps are:

- Create a sense of urgency.
- Build a coalition.
- Form a strategic vision.
- Get everyone's buy-in.
- Remove barriers to enable action.
- Generate short-term wins.
- Sustain acceleration.
- Institute change.



Kubler-Ross Change Curve

More well-known as the 5 stages of grief, this method is considered a reliable model for change. The idea is that organizations can better prepare for change by anticipating personnel reactions.

The 5 stages are:

- Denial
- Depression
- Anger
- Acceptance
- Bargaining



McKinsey 7S

Created at the McKinsey firm by Thomas J. Peters and Robert H. Waterman, this method zeroes in on the 7 fundamental elements of every organization, starting with the hard elements and transitioning into the soft elements:



Strategy



Structure



System



Staff



Shared Values



Style



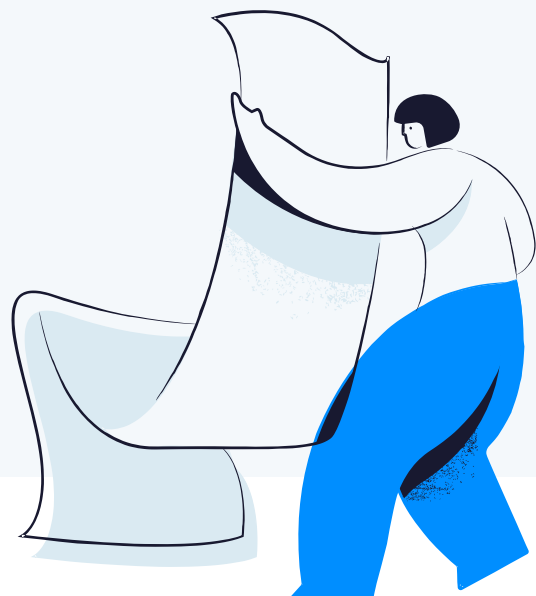
Skills

PDCA

Also referred to as the Deming wheel or control cycle, this model was founded in the 1950s. The acronym stands for: Plan-Do-Check-Act/Adjust. It's a cyclical process for continuous change and improvement.

It follows these steps:

- Make a plan.
- Test the plan.
- Implement the plan.
- Evaluate the plan and make necessary changes.



Bridges Transition Model

Another people-centric model, the Bridges Transition is about the transition to the change and people's experience, not the change itself. It emphasizes how employees let go of the old and adopt the new.

There are 3 stages:

- Ending/losing/letting go
- Neutral zone
- New beginnings



Change Management Plan

With a change management strategy in place, a proper plan can now be constructed. Creating a plan for change takes into account all of the details such as budget, time frame, scope, communication, and resources.

The following steps will help you prepare your plan for change.

Prepare the Organization for Change

An organization must be ready for changes, both culturally and logistically. Start with the cultural prep then dive into the logistics side of things.

During this phase, change managers focus on helping employees understand the need for change. They need to raise awareness about existing issues and challenges the organization is facing that necessitate change. In essence, you want to get the buy-in of employees as it will reduce friction and resistance along the way.

Craft a Vision for Change

This is where the plan is pieced together. The change manager develops a detailed and realistic plan for bringing about the change(s). A plan can only be created after the company is ready to embrace change.

As mentioned, the plan should include:



- Strategic goals
- Key Performance Indicators (KPIs)
- Project stakeholders and teams
- The project scope

The plan should also include potential roadblocks that could arise and how they will be handled.

Implement the Changes

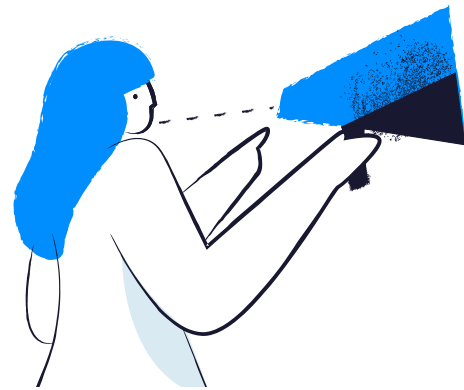
Now it's time to get started. Whether the change is structural, strategic, systems or process-related, connected to employee behavior, or anything else—follow the outlined plan, step by step. At this point, change managers must empower their people to take the required steps to achieve the goals of the change initiative. As the company implements changes, managers must be prepared for obstacles—identifying, preventing, removing, and mitigating them as they go.

Regular and repeated communication of the plan and the organizational vision throughout the process is crucial. Team members will need frequent reminders as to why the change is being undertaken.

Embed Changes Within Company Culture & Practices

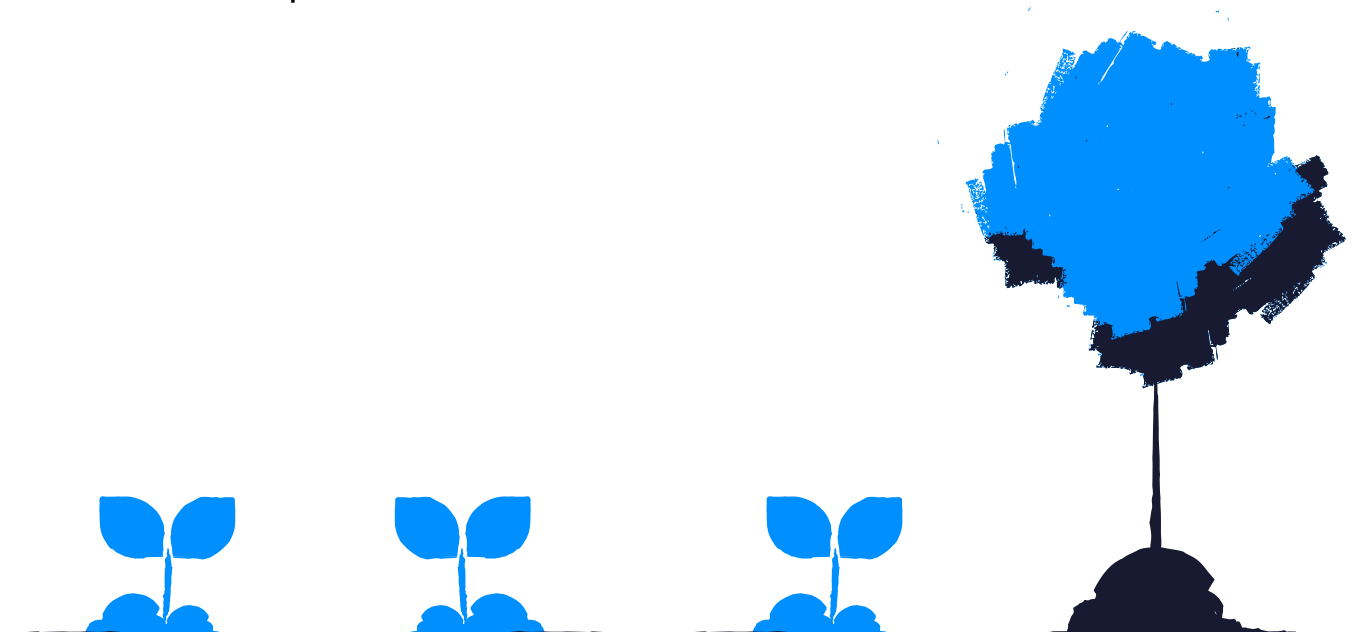
Even once the changes are successfully made, the journey is not over. Change managers need to make sure there are no reversions to previous states or the status quo. This is particularly relevant to changes in processes, workflows, culture, and strategies. You don't want employees to fall back into the old way of doing things.

That's why it's so important to make sure changes are deeply embedded in company culture and practices. Consider new organizational structures, controls, and rewards to prevent reversions.



Review Progress & Analyze Results

When it's all done, how do you know it was successful? The completion of changes doesn't necessarily indicate success. By conducting reviews and analyses during and after the change is made, business leaders can determine if they were truly successful, or if they failed or had a mixed result. There are also valuable lessons and insights to be learned that can be helpful in future initiatives.



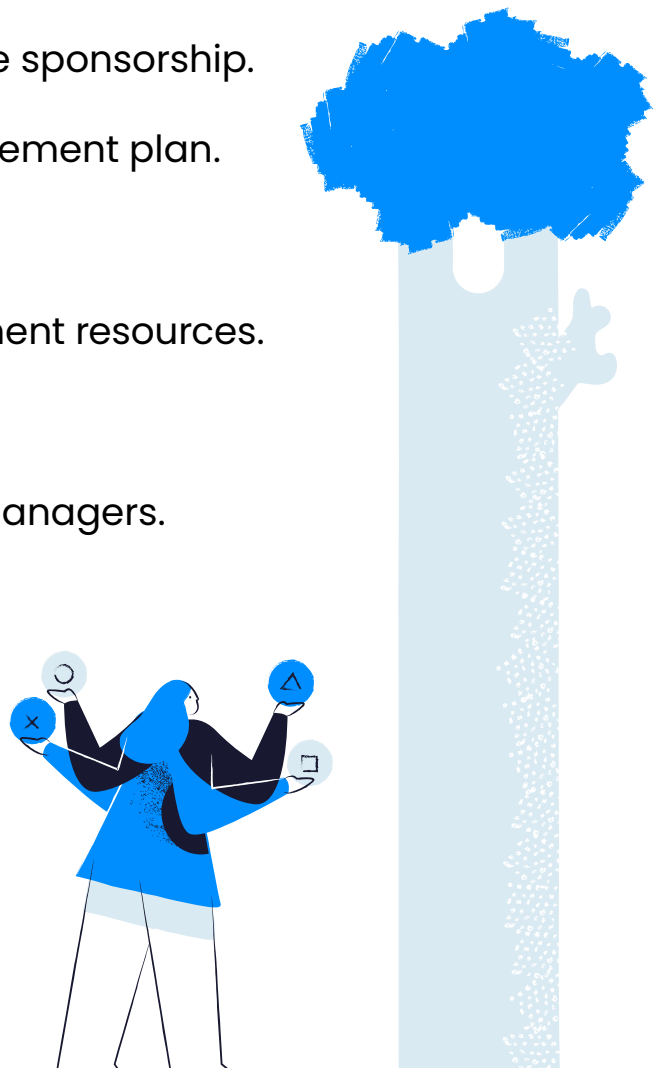
Change Management Principles

There are some principles you should adhere to when implementing change. Keep these in mind regardless of the size of change you're undergoing:

- **Understand change.** We change for a reason.
- **Plan change.** Purpose and direction are necessary.
- **Implement change.** Change must also occur on the individual level.
- **Communicate change.** Be open and transparent.

In addition to these guiding principles, here's a list of best practices for change management:

- Mobilize active and visible executive sponsorship.
- Follow a structured change management plan.
- Engage with front-line employees.
- Have dedicated change management resources.
- Interact with project management.
- Engage with and support middle managers.



Change Management Certification

You can become a [Certified Change Management Professional \(CCMP\)](#). The CCMP course is based on the Association of Change Management Professionals' Standard for Change Management, and it's globally recognized.

To become a CCMP, you must apply for the course, get the handbook, and successfully complete the exam, which consists of 150 multiple questions.

Who Should Certify in Change Management?

The CCMP role is good for anyone in change management wanting to apply the best practices. This could include:

- Organizational change managers
- Change leaders
- Project management leaders
- HR professionals
- Training and communication professionals
- Knowledge management specialists



What is the Value of the CCMP Certification?

This credential will help in your job search whether entering the job market or trying to raise your profile as a qualified professional in the industry. It will differentiate you from other candidates, as well as provide other benefits such as:

- Showcasing knowledge and experience
- Aligning you with an international standard
- Enhancing career prospects
- Demonstrating commitment to ongoing professional development

***The course costs \$595USD for members of the ACMP, and \$745USD for non-members.**



The Role of a Change Manager

First define the role of a change manager: a person who plans, develops, delivers, and tracks change management deliverables. This includes communications, training, stakeholder engagement, change impact assessment, organizational readiness analysis, coaching, resistance management, and change reinforcement.

The role of a change manager is to come up with a plan for, carry out, and manage change within an organization. They help personnel transition from their current state to a future state.

The change manager—guided by the change management strategy—executes the complex plan for change in a way that makes it easier for impacted users and stakeholders. Change managers work with project teams and business partners who are eager for change. They must be able to build cross-functional relationships, think critically, and take initiative to drive results.

Some specific responsibilities of a change manager are:

- Managing stakeholder relationships
- Conducting effective change impact assessments
- Defining and measuring success metrics and monitoring change progress
- Identifying and implementing improvements to the change management strategy
- Creating executive presentations

Change Management Tools

Some change management tools that can help with the transition include:

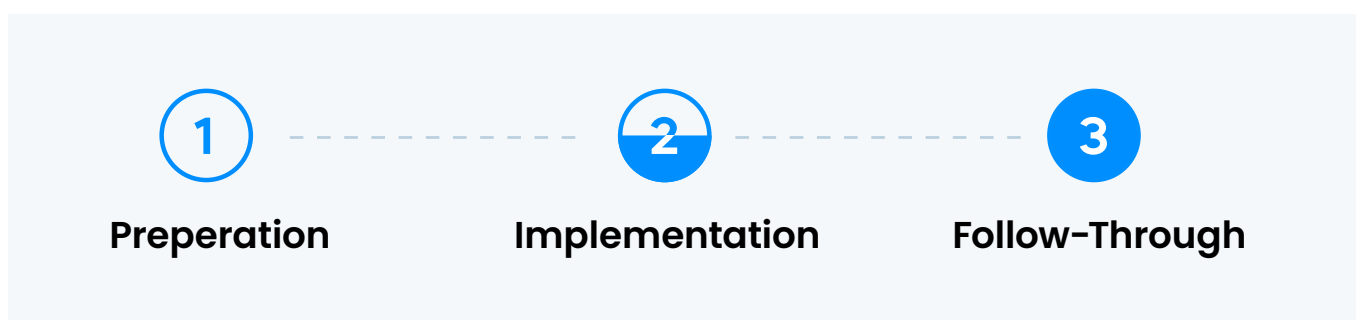
- Flowcharts/process Maps
- Culture mapping
- ADKAR analysis
- Force field analysis
- Kotter's 8-step change model
- Lewin's change model
- Gantt charts



Organizational Change Management

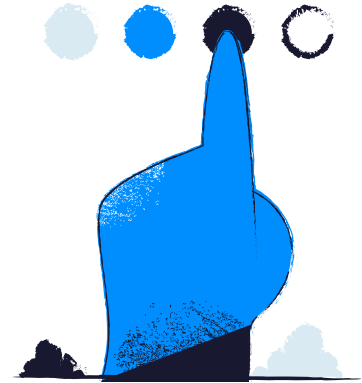
Organizational change management is when companies make major changes, whether it be the culture, technologies, or infrastructure. It's how organizations leverage change to bring about a successful resolution and enhancements to the business.

Typically, there are 3 phases to organizational change management:



What causes organizational change? There are a variety of factors that necessitate change. Some of the most common ones faced by managers include:

- New leadership at the helm of the company or within certain departments
- Alterations in team structure
- Implementation of new technology
- The adoption of new business models



There are both adaptive changes and transformational changes. The former entails small, incremental changes that organizations adopt to meet needs that evolve over time. Such changes are minor modifications or adjustments by managers. Examples of this type of change might include upgrades to operating systems, or using new web-based forms.

Transformational changes are large-scale. They might be major changes such as a shifting mission statement or strategy, or company structural reformations. Obviously, these big alterations take time and resources to properly carry out. Transformational changes are usually made in response to external factors, like disruptive competitors, supply chain issues, or consumer demands. An example of this type could be the adoption of a CRM.

Change is necessary for growth and success. Change management helps employees understand, adapt, and enact the changes. Which is why an effective change management strategy is the ultimate gateway to building a culture of streamlined collaboration and productivity.



About WalkMe

WalkMe's cloud-based Digital Adoption Platform enables organizations to measure, drive, and act to ultimately accelerate their digital transformations and better realize the value of their software investments. Our code-free platform leverages our proprietary technology to provide visibility to an organization's CIO and business leaders, while improving user experience, productivity and efficiency for employees and customers. For more information, please visit our website at: www.walkme.com

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