

First Things First: how to scope, lead and embed change

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What we'll cover

- Change models
- Developing support for change
- Reactions to change
- How does your organisation react to change?
- What is your role?
- Communications
- Doing the change and keeping on track
- You've changed! Now what?



The small print!

Some definitions

- Change management- management of change and development within an organisation
- Change- transformational change
- Model- Lewin, Kotter- a way of doing
- Tool- something which gets something done
- Change agent- anyone with the skill or power to guide the change effort

- Other models may be available- for example, Dr Kotter's 8 step process
- Credits and Bibliography and extra resources at the end

- A bit about me







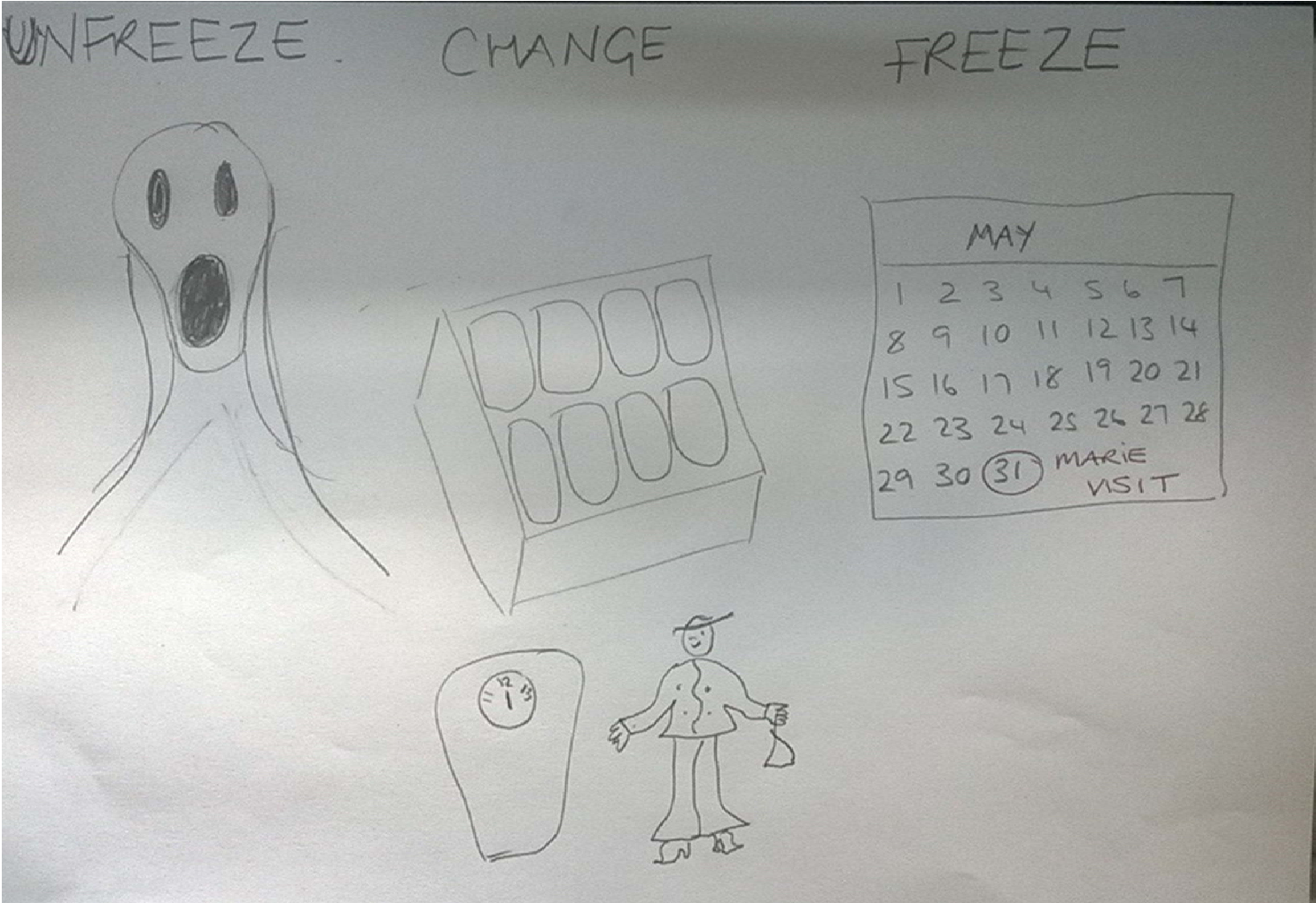


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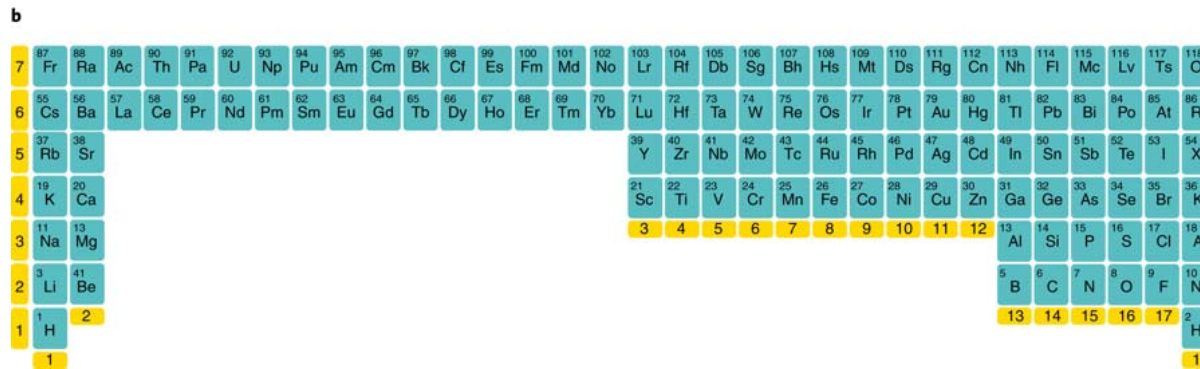
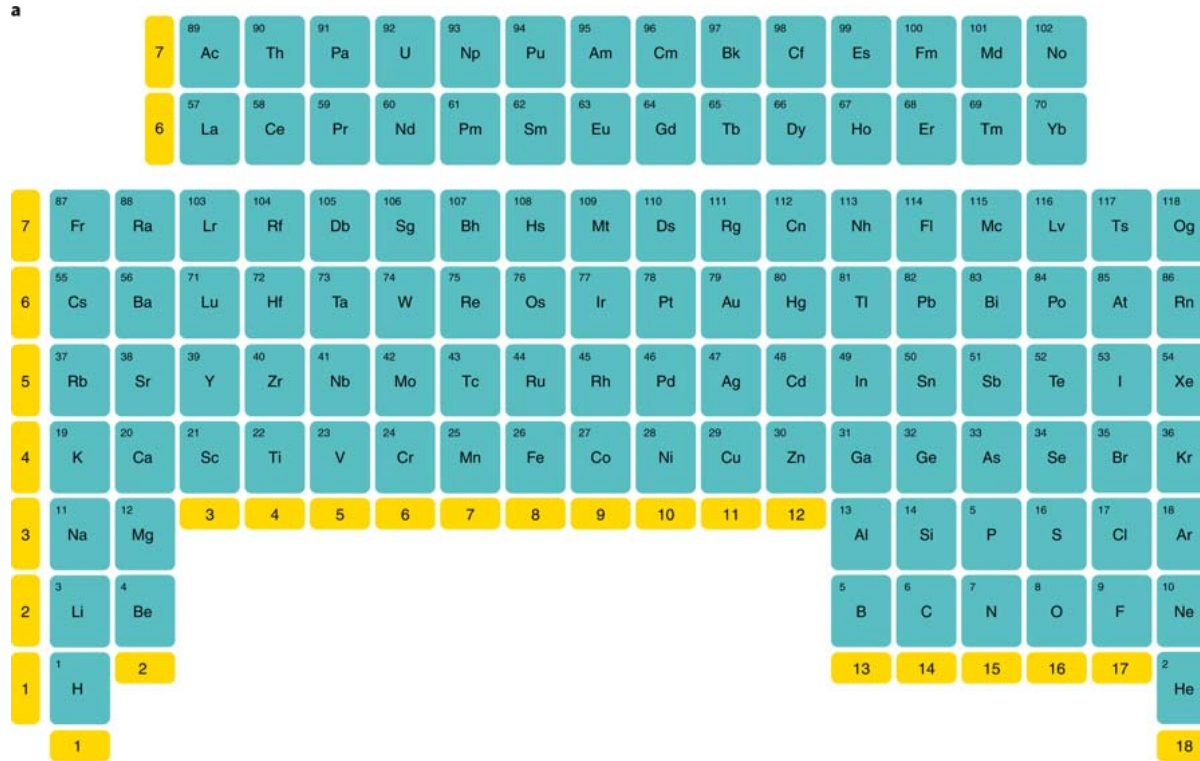
Kurt Lewin three step change model



Step 1- unfreeze

- How do you know what change is needed?
- What is driving the change?
- What information do you have to inform decisions?
- Are senior leaders ready for this change?
- Do you have the right people available?
- How ready is your organisation?
- How ready are people?
- Have you tried this before?
- What will happen if you don't change
- Check for assumptions





Create a
why



Be clear on the benefits

- Identify the benefits clearly
 - The reason for change is clear; the benefits provide a focus for everyone.
 - Success can be identified, recognised and celebrated, thereby having a positive impact on future change initiatives.
 - There is clear agreed accountability for sustaining change.
 - Progress can be tracked, monitored, delivered - and each step can be communicated.
 - Stakeholders are clear about both current and expected performance.
 - The credibility of the change is enhanced through realisation and recognition of the benefits.



Develop Support

- Forcefield analysis (exercise)
- Influence- Fischer and Ury (Getting to Yes)
- Push and Pull



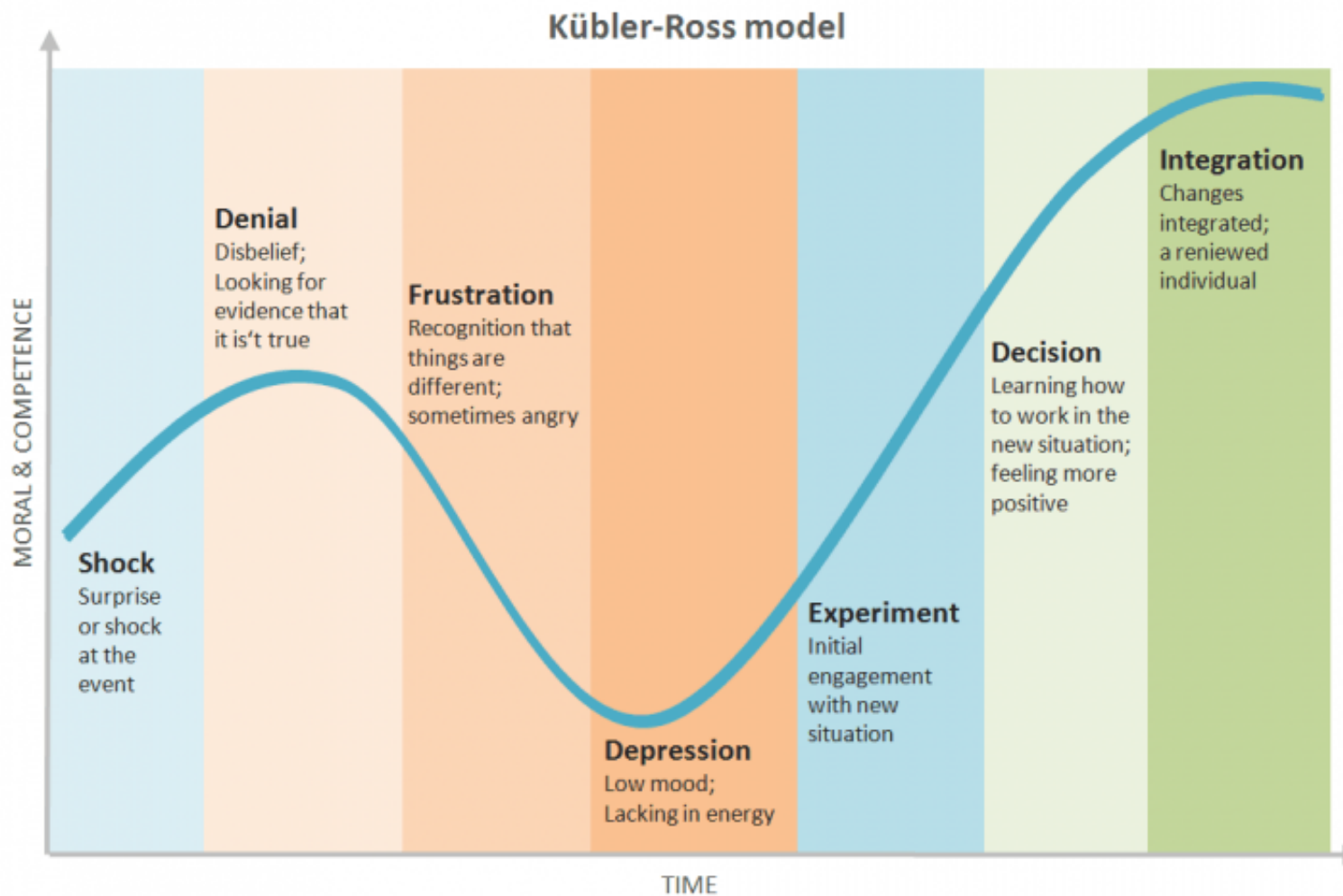
Case study

An established data service catering to academic users has a new Director. The new Director is full of new ideas and comes from a business background. They want to start charging for access to some services. The Director's mantra (internally) is that 'people shouldn't expect things for free'. A business case has been developed and it shows that there are good likely outcomes:

- it would make the data service more sustainable rather than relying on research funding only,
- the current IT systems could support it
- there is the possibility of bringing in performance bonuses related to income

The Director is very keen to proceed.





Interpreting the Curve

- Not everyone will be at same stage
 - People go forward and back
 - Changes at home and work- they may be processing something already
 - Has there been other changes as well?
 - Some people get stuck!
-
- What to do:
 - Beginning: clear descriptions and explanation
 - The downslope: listen and support
 - Upslope: coach
 - Lose/ Keep/ Gain grid



Lose/ Keep/ Gain

- Help people understand the impact of the changes
- What are they keeping? Same office, same team, same pay, same holidays?
- What are they losing? Relationships/ roles/ systems etc they will not have once change is implemented
- What will they gain? What they did not have but will have after the change



Step 2: Change

- Clarify your role- are you leading or managing
- Do you have project management experience or have access to someone who does?
- What internal project management or programme management toolkits do you have?
- What systems do you have to support you- Smartsheet, MS Project, Trello, Basecamp, JIRA etc
- What is your organisation's approach to risk?
- What is the usual form of Governance for projects- does it differ with size?
- Who is on your team? Who else do you need?
- Who is your project owner and sponsor- do they know their roles?





National Audit Office: renewing the EastEnders set

- the BBC's planning in 2015 for its renewal of the EastEnders set did not consider the specific skills required in the programme team.
- the team had inadequate expertise in construction project management.
- there was limited construction knowledge to manage the programme's design, procurement and construction activities
- led to coordination problems
- led to commissioning internal and external reviews to resolve design issues and inconsistencies
- ineffective challenge of programme documents and decisions
- In 2017, the BBC recruited a new programme director and a Front Lot project manager – both with construction experience
- 3 years behind schedule, 45% over budget

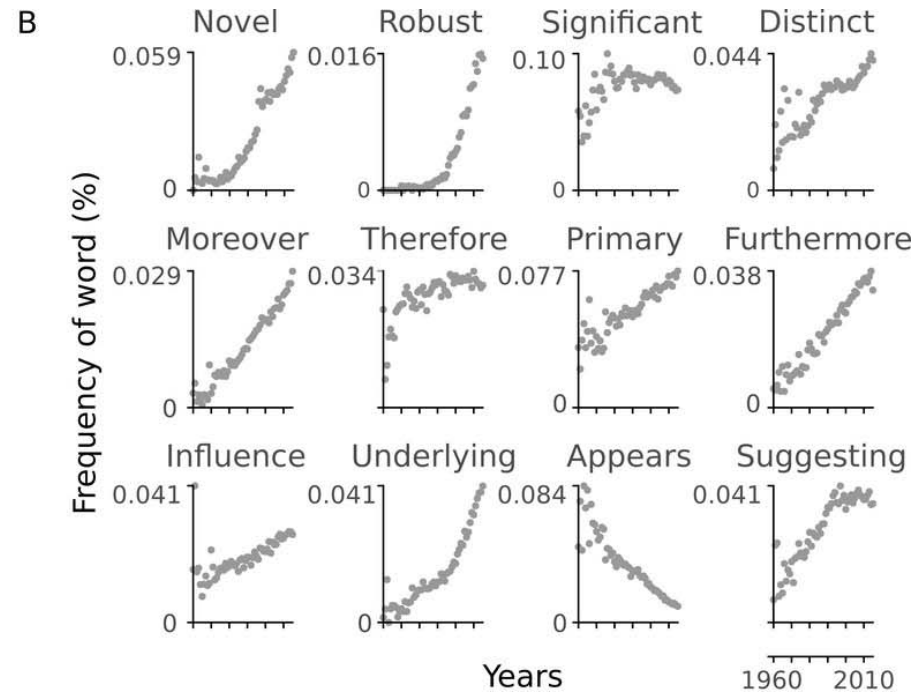
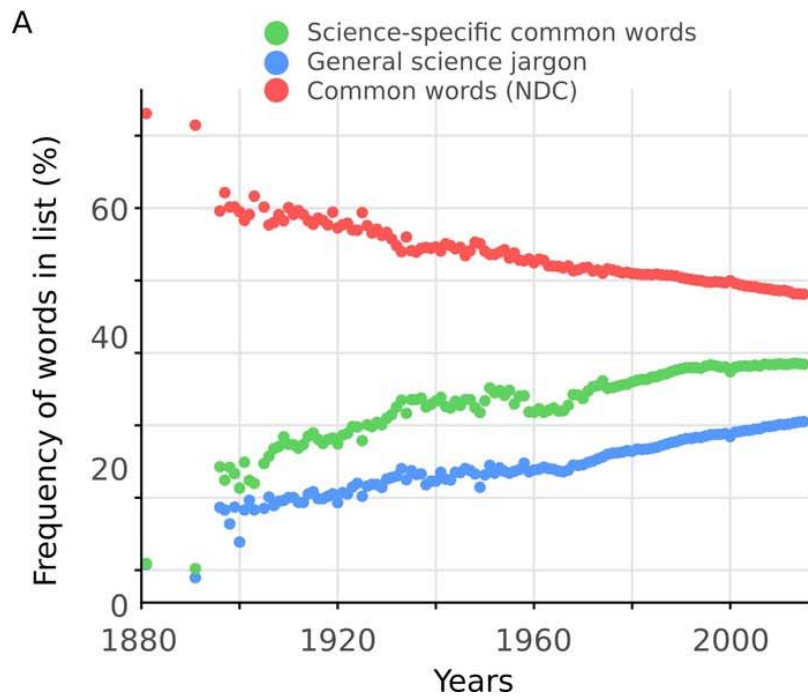


Communications

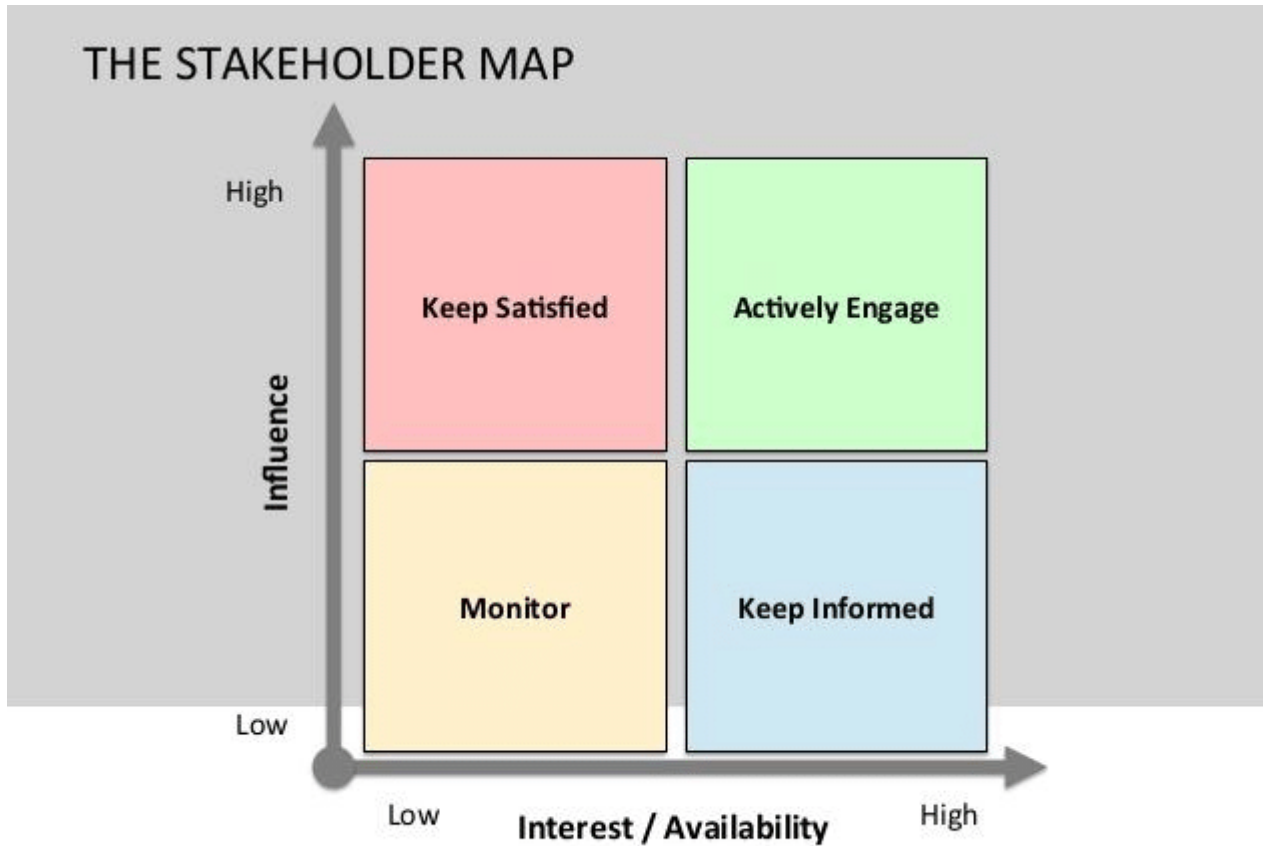
- External v internal
- Carry out a stakeholder analysis
- Develop a communications plan
- Include milestones in your project plan
- Don't hide behind jargon
- Remember your why!



The readability of scientific texts is decreasing over time



Stakeholder analysis exercise



Source: The Stakeholder Management framework for teams, programs and portfolios, Scaled Agile, Inc, 2012



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Communications Plan Example



| Stakeholder | Objectives of communications | Key messages | Type of activity | Frequency/Timing | Responsibility/Sign-off |
|-----------------------|--|--|---|--|---|
| (Individual or group) | (What level of commitment do you need? Do you need active support or do people just need to be kept informed?) | (What will the stakeholders want/need to know and do?) | (Media (eg. presentation, workshop, one to one meeting, newsletter, etc.) | (Timings should anticipate key milestones – make sure people have adequate warning of major changes) | (Who should carry out the activity? Who is responsible for ensuring that it is done?) |
| | | | | | |
| | | | | | |
| | | | | | |

Keeping on track

Examples of common problems:

- A very senior stakeholder starts strongly suggesting (to anyone who will listen) that the charge should not just be for access but researchers should be charged every time their research is cited
- The Director goes to a conference and is excited about the impact of research and is worried that the charge will affect research. The Director wants to stop the project even though the stakeholders are now all on board
- the project manager leaves
- An influential researcher says they may not use your services in future



Quality/ Time / Cost



Quality/ Time / Cost



2012 London Olympics

What is the most important thing?

£2.7 billion contingency budget

Estimating time exercise
(Wiseman- how done before 90% etc)



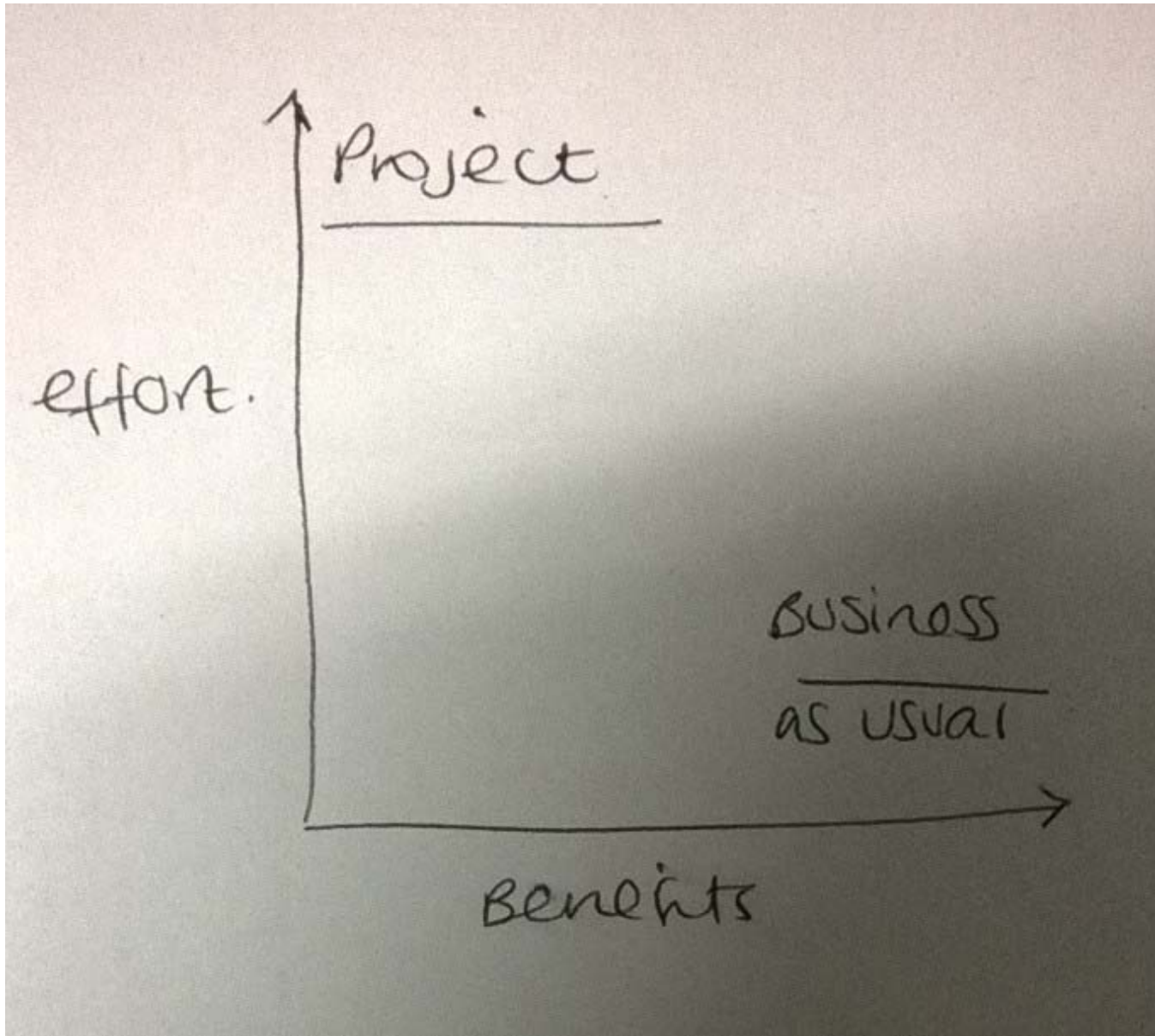
Success! Now what?



Step 3- freeze

- This is part of your plan!
- Embed change
- Prevent roll back
- Rebuild
- Reflect- project review
- Transition to business as usual
 - Who takes it on?
 - Is everyone clear the project has stopped?
 - What are the outcomes now?
- why it is important





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Credits

- <https://people.com/home/marie-kondo-reveals-the-secret-to-actually-finishing-tidying-up-plus-more-tips/>
- <https://www.whatsontv.co.uk/im-a-celebrity/trinny-and-susannah-tipped-for-celebrity-jungle-207317/>
- <https://www.dailymail.co.uk/tvshowbiz/article-6463081/Gillian-McKeith-59-insists-outlandish-dresses-worn-empower-confident-women.html>
- <https://www.pinterest.co.uk/pin/335236766010225936/>
- Change pictures- by presenter
- <https://www.nature.com/articles/s41557-019-0253-6/figures/1>
- <https://www.cleverism.com/understanding-kubler-ross-change-curve/>
- By Source, Fair use, <https://en.wikipedia.org/w/index.php?curid=7398314>
- <https://elifesciences.org/articles/27725>
- <https://www.projectsart.co.uk/project-management-scope-triangle.php>



Additional resources

- Kurt Lewin Change model
- Kotter's 8 step process <https://www.kotterinc.com/8-steps-process-for-leading-change/>
- National Audit Office <https://www.nao.org.uk/report/framework-to-review-programmes/>
- R Wiseman- 59 seconds: Think a little change a lot (2009)
- D Kahneman- Thinking, Fast and Slow (2012)
- www.futurelearn.com courses on Leading and Managing Change,
- www.edx.org course on Risk management for Projects

