

Practical Methods for Successful Change Adoption

Aimee Baxter, PMP

Macalester College, Business Services, 1600 Grand Avenue, St. Paul, MN 55105

abaxter@macalester.edu

Most of us know that change adoption is a key to project success. But what are the elements that can insure a successful project adoption? What are some basic tactics that can be used to help make sure that stakeholders and in-the-trenches users have the best attitude possible to make the change and spread the news to their colleagues?

How Complex?

First, determine how large the change is. How much of an impact will the project have on the culture of the organization? Are you asking your organization to take on a change they are ready to make? Then the planning, communication, and time spent on selling the project can be scaled back. If this is a change that will impact the entire organization, and the project has been attempted before and failed—but it still must go forward and many are against it—then you have a much more challenging task of selling the idea and keeping stakeholders and end users updated (and positive) throughout the project. Plan for extra communication at a lot of levels, roundtables to talk about their requirements, forums to have users test drive the solution, and more stakeholders—and even bring on some that may not be in favor of the project.

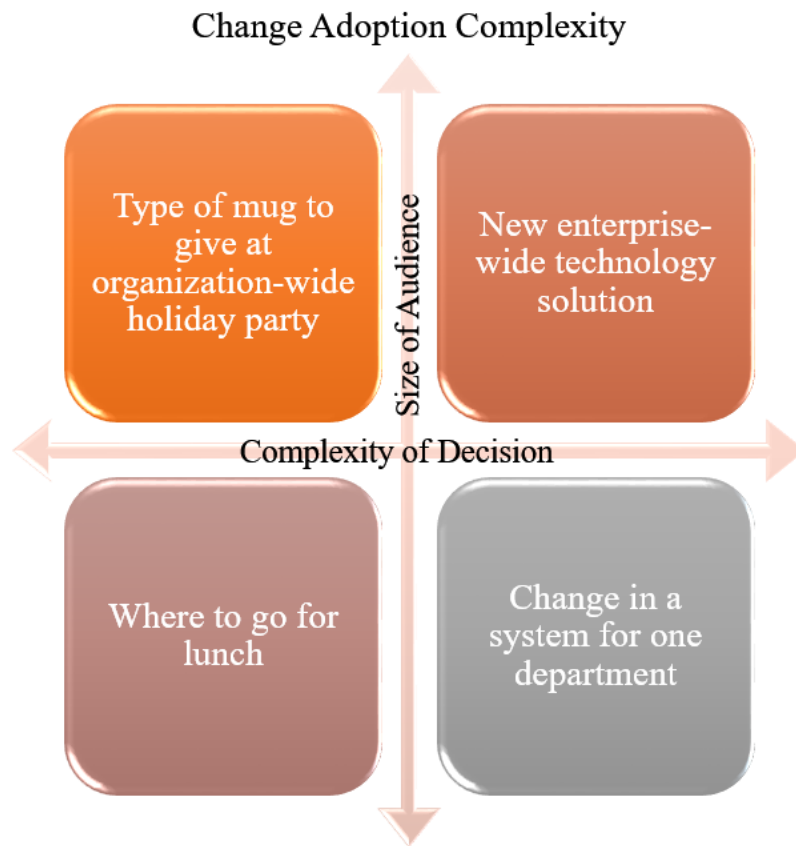


Figure 1: Change adoption complexity.

Listen to the Users, It Will Be Worth It

Everyone wants to be heard. That is no different when you are in charge of changing something. As an agent of change, and someone who is invested in the change being successful, the first step is to gather requirements.

- What did users like about the old system?
- What didn't they like?
- If this is a new system, what are they hoping to automate that they haven't been able to do previously?
- Do they want to simplify or make a business process more solid or secure? Have them step through what they do.
- Ask how they interact with their customers—internal and external.
- What are their frustrations?

Prepare your questions ahead of time, but then be willing to add questions to your interview template as you talk to your users. Be the best listener possible and don't jump to solutions! Show you are truly interested in their needs, but make no promises. Let them know you are taking in everything they are telling you, documenting it, and will bring this information back to be evaluated. Users will understand that with the maturity of business technology, not every feature will be addressed and answered. Requirements interviews are invaluable in finding key supporters and detractors. Often, the most important features in the solution are identified as mandatory from the end users' point of view are determined during the initial requirements gathering.

You may consider gathering requirements from multiple user groups, using alternate methods. For example, you may conduct in-person interviews for the stakeholders you have identified, and create a survey for the wider community. The survey for the wider community can help you to identify a need that you may not have known otherwise, and the survey helps to start the communication about the upcoming project.

This requirements gathering method can help identify risks. Some examples include:

- Risk(s) if these feature(s) are not implemented
- Risk(s) if this business process is not addressed
- Risk(s) if this group is not able to interface with the internal or external team

It is important to meet with all of the key end users; you will gain so much insight, even if you can't deliver on every aspect.

Communicate, Plan, and Then Communicate Some More

I wholeheartedly agree with PMI's *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* – Fifth Edition (PMI, 2013) about communication plans—and I put them to practice. I have developed a template that has all of my ideas of communication and publicity ideas. I refer to the template each time I am working on a project and use this as a jumping-off point whenever I am developing a communications plan. I never assume that any one method of communication would be enough. I always add a date for when the communication should occur; this way, the communication happens on a schedule and the team does not rely on remembering to communicate ad hoc in the heat of a busy project or at the end—once everyone is moving on. That is why a plan is so important—it helps us remember the what and the when. I review the plan with the team regularly so we can adapt the communications as the project evolves during roll out.

There are some basic thoughts about communication that everyone knows, but there are some disciplines and structures that might be helpful to think about before and during a project to make communication more thoughtful and planned.

PLAN

- Make a plan—from something formal to just a few notes—either way, this will give you the clarity you want so you can launch certain communications on certain dates and perhaps make changes in your plan based on what you hear back from the communication.

AUDIENCE

- Who is your audience? Consider all of the possible audiences your project may impact and make a list.

TIMING

- Time communications throughout a project or initiative: before (here is what is coming), during (here it is), and after (how did it go?).
- Think carefully about the timing of your communication. You may not want to give some initiatives too much of a lead-time because this may allow time to worry or speculate about what is coming.

CHANNELS

- Use a variety of communication channels; no one group of people will respond to the same method. This is your best chance of getting the message through to everyone. How do you like to receive your communication? Does it depend on the message? Via email? In the electronic newspaper? Via phone? At a staff meeting? One-on-one meetings? Training sessions?
- A couple of methods may be needed if it is a large initiative because people may not hear you the first time. Brainstorm a list of communication methods and keep it for next time; it will make it that much easier.
- Communicate in a method that your audience is comfortable understanding. For example, when communicating a new process is a flowchart the best method or a narrative of the steps – or both?

STAKEHOLDERS

- Have a couple of people review your communication; and ideally, involve stakeholders that are in different roles who will bring a fresh perspective.

DOCUMENT

- Plan for a lessons learned review when the project is completed to reflect on what went well and what you would do differently next time. Document your findings so you can refer to the notes, and change any of your key documents that you rely on so they are ready to go for the next project.

Ambassadors as a Secret Weapon – Trusted Advisors Who Were Champions, Advocates, and Critics

With such a diverse organization of interests and concerns, I have found that carefully selecting a group of ambassadors who are invested in the change in technology is a boost to the success of any project. I have used this strategy multiple times and found it useful every time.

First, I make a list of those constituents who are either the best champions of the existing system or the loudest critics. We work to gather representatives from the various parts of the organization—in our case, a college, not only the academic departments, but the administrators as well. I always look for ambassadors who are *not* shy and who are willing to speak openly about the project/system or software enhancement. Second, I ask the ambassadors to help us with the requirements, testing, and early training. Lastly, I always ask the ambassadors to spread the word about the project. If the message with the ambassadors has been open and honest, then the word about the projects is passed along, even if the message is that everything isn't perfect.

Take the Leap, Use Live Data to Gain Speedy Project Adoption

During the recent implementation of a time clock system, there were a number of challenges. The time clock system would be “turned on” and two weeks later—using the new system—the time cards would be approved for the first time. Over 1,400 employees would be using the system with overtime approvers reviewing their time clock in a new system. The time approvers would need to be confident of the new system in order to complete their approvals on time and with a high rate of accuracy. It was decided to have training once the time clock system was live and the employees were clocking time so that the time approvers would see real data were key to the adoption of the new system.

Training was delivered by:

- Lecture with static screen shots
- Hands-on exercises with live data
- Open labs available on payroll approval days (two days only)

Use of the live data:

- Captured the time approvers' attention – it was their employees time that they were trained on as examples
- The time approvers encountered some circumstances during hands-on training they may not have encountered in “canned training” scenarios
- Earned their trust in the new system as they had a chance to navigate the system in the training room with the support of the payroll staff and trainer
- Further testing on the live system by users uncovered technical issues early in the adoption of the system
- Developing a robust set of training scenarios would have been very difficult and would not have been complete; live data was best and had unusual examples

Conclusion

In all, successful change adoption can be tricky. Perhaps implementing one or more of these techniques can help your stakeholders to get engaged in all stages of the project in the change, and be a part of the promotion of the good the change will bring.

Reference

Project Management Institute. (2013). *A guide to the project management body of knowledge (PMBOK® guide)* – Fifth edition. Newtown Square, PA: Author.

About the Author

Aimee Richcreek Baxter has worked in the technology industry for over 25 years as a project manager and technology trainer. She has been a Project Management Professional (PMP)® certification holder since 2000. Currently, Ms. Baxter works at Macalester College, as a financial system specialist bringing technology solutions to the Business Services Office and the Macalester community it serves. She utilizes her PMP skills every day from small tasks to larger, campus-wide projects.