Creating a Positive Change Culture

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About Me & Leveraging KM for CM

- **Stakeholder and User Adoption Lead for REI Systems**

- REI is a leading technology services contractor that provides government solutions with a focus on advisory services, grant systems and open government web platforms.

- **Experience:**
  - Provide guidance on the creation and execution of change management and user adoption efforts with a focus on stakeholder engagement
  - Implemented knowledge management efforts ranging from revamping a document management system to building a global health intranet
  - Worked many years ago as an online community producer
Today’s Session Objectives

• Develop a compelling and clearly articulated business case for change in alignment with the mission and vision

• Determine impacted stakeholder groups

• Use KM tools and techniques to create a change culture:
  • What do they need to know
  • How can they access the information
  • How can they share the information
  • How can they use the information
What is Change Management?

The process, tools and techniques to manage the people side of change to achieve a required business outcome.
Everything is about change

Change is inevitable and necessary …

• The **project intent is to bring about change**, for example implementing a new process or a new technology solution

• The project leader will challenge the team to **conceptualize a new solution or version of a solution** tailored to the customer’s requirements

• The **environment in which the solution will be deployed will need to adjust** to ensure the solution is a success.

• New team will need to **figure out how to communicate and collaborate**, while teams with a history will build on existing relationships in a new work environment.
Four Key elements of a successful change culture

Identify the needs of the stakeholders and support required to empower them to bring about change for your organization

1. Informing
2. Preparing
3. Empowering
4. Reinforcing
A Balanced Change Management Approach

**SOFT-SIDE (People-Individual):**

*Vision, Logic, & Emotions*

- Why is the change effort needed?
- Why can’t things stay the same?
- What is the cost of keeping things the same?
- How will this change help?
- How is this going to be different?
- What is the benefit/risk?
- What does success look like?
- Who is impacted and how?

**HARD-SIDE (Technical-Organizational):**

*Plan, Resources, & Metrics*

- What is the timeline?
- How will change be managed (plan)?
- What is the ROI (cost & benefit)?
- What is impacted/What stays the same?
- When and how will things change?
- How will change be supported?
- How will we measure success?
- Who needs to be engaged?
Business Case for Change

Develop a clear and impactful business case aligned to the mission and vision of the organization.

**Sample Mission Statement:** Empower lives through impactful literacy programs

**Sample Vision Statement:** Catalyst for collaboration in creating a literate world

**Business Case:** To achieve our mission and vision, we need a CRM System to easily track, nurture and leverage relationships with literacy champions and partners to maximize service impact and reach.

**Risk for not changing:**
- Loss of critical information on key stakeholders (who they are)
- Lacking understanding of our relationships with stakeholders (why they care)
- Can’t keep track as program expands (what we are doing)
To conquer illiteracy, we need a CRM System to easily track, nurture and leverage partner relationships to maximize service impact and reach.

**People**
- On-going training/ how to use the tool
- Staff to design/manage the tool
- Stakeholder engagement to provide data
- New roles and responsibilities

**Process**
- Data gathering & analysis process
- New engagement efforts with stakeholders
- New ways to use data for decision making
- Improvement/feature suggestions

**Technology**
- Budget – how much cost?
- How fit into current IT environment?
- If replace system, how migrate?
Informing Using KM Tools/Techniques

Lay the foundation for change by engaging key stakeholders and communicate the vision, anticipated changes and benefits

Upper Management

- Business Case Briefing
- Cost Benefit & Risk Analysis
- Visioning Session
- Demo “to be” state/how align with vision

Staff

- Vision & Change Brown Bag
- All Hands/Town Halls
- Newsletter/Intranet
- Change Champions

Partners/Customers

- Website/Social Media/E-newsletter
- Customer Engagement Activities
- Conference
- Quarterly Meetings
Preparing Using KM Tools/Techniques

Conduct a stakeholder analysis, understand perceptions, address concerns and educate on role for how the changes will be implemented

<table>
<thead>
<tr>
<th>Upper Management</th>
<th>Staff</th>
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<tbody>
<tr>
<td>• Demonstrate thought leadership: White Papers/Blog Post to position the vision/change and what’s to come</td>
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<td>• Leadership Toolkit: methods to motivate and help staff through change</td>
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<th>Partners/Customers</th>
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<tr>
<td>• Needs Assessment/Change Readiness</td>
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<td>• Training (tools, process, roles)</td>
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<td>• Office Hours with the managers</td>
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<td>• Working Groups</td>
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<td>• Online Learning Modules/Tutorial</td>
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<td>• Getting Ready Checklist</td>
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<td>• Webinars/Videos “How To”</td>
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Empowering Using KM Tools/Techniques

Build ownership and provide opportunities to provide input on how the changes are carried out.

Upper Management

- Listening sessions (Virtual & In person)
- Talking Points (Board/Staff)
- Weekly Email Updates & Progress
- Recognition and Remove Obstacles

Staff

- Yammer – Online Community/Help Desk
- Hack-a-Thon/Shark Tank Contest
- Super User Groups/User Testing
- Change Agent Network

Partners/Customers

- User Testing
- Information Sessions
- Focus Groups & Surveys
- Help Desk
Demonstrate effectiveness of new solution to facilitate user adoption and allow for future innovations

- **Upper Management**
  - Convey how new vision is achieved (Podcast/Video)
  - Recognition program
  - State of the Project Roadshow

- **Staff**
  - Community of Practice
  - Innovation Program
  - Infographics/Dashboards
  - Refresher Training

- **Partners/Customer**
  - Contests/campaigns
  - Success Stories
  - Newsletter
  - Social Media
Key Take Aways

• KM tools and techniques are instrumental for collaboration, and creating and sustaining a shared understanding of the case for change.

• People make change happen but they need a vision they can believe in to get there and support to make the vision a reality.

• Educating stakeholders through knowledge sharing helps reinforce the business case and creates a culture to support stakeholders through the change.
Connect:

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