

Using Humanity to Drive Organizational Change

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What is the issue?

According to a 2017 survey on how Canadian businesses were transforming, 86% of the businesses surveyed were experiencing or planning a business transformation in the next twelve months, and 93% of those businesses felt they were facing barriers to successfully implementing their transformation initiative (MNP, 2018). One of those key barriers is the overall failure to plan and to integrate human emotion into change. Many organizations still rely heavily on the project management side of change (i.e., spreadsheets are clear and easily illustrate progress) when arguably the most critical element of change is managing the people who are responding to the change, a process that is often unclear, sometimes downright messy.

Why is it important?

In today's VUCA world (volatile, uncertain, chaotic and ambiguous), change is constant, and the ability to manage change can be a matter of survival in every sector in every part of the world. Increasing your organization's capacity to adapt (and going on to become a "learning organization") will spur innovation and continual improvement, keeping the organization relevant and competitive.

What can be done?

This MAG will give organizational leaders ideas and insights into engaging the most critical element of successful change implementation: people. The key unit of organization change is the individual, yet organizations continue to overlook the time, effort and energy required to generate the buy-in that will ensure sustainable positive results.

This guideline will cover the critical elements of effectively managing change. It will provide practical tips and templates to help business leaders assess the readiness for change within their organization. For those organizations that are not ready or able to adapt to the proposed change, this guideline will provide ideas on how to grow that capacity, become more adaptable and prioritize tasks for a successful implementation. Above all, this guideline will provide a human approach, turning "managing change" into an opportunity to create opportunities to learn through change and therefore increase engagement.



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Overview

Organizations must start seeing change less as a threat and more as an opportunity to strengthen themselves internally (e.g., culture, engagement, employee and customer retention). That means that the individuals within the organization must also cultivate internal resilience and put their effort and energy into learning and adapting.

We need to shift our mindset from “managing change” to “managing learning.” That starts with understanding human behaviour and what happens in our brains as we experience and process change. Anticipating how people will behave, and then planning for it, should be a critical part of every change plan but is often overlooked. We must also introduce and foster the concept of a growth mindset within our organizations. Since the publication of Carol S. Dweck’s groundbreaking book *Mindset: The New Psychology of Success* in 2006, growth mindset has become a mainstream idea; but due to the additional time and effort it takes to deal with people instead of process, it’s only recently that organizations have started integrating the growth mindset concept into organizational change management.



Key objectives

This MAG aims to achieve five objectives for those wanting to improve their skills as organizational change agents:

1. Highlight the importance of humanity in change management and to understand how our brains work (i.e., why we behave the way we do during periods of change). This knowledge aids in designing and implementing change management more effectively.
2. Link change management frameworks and thought processes to CPA’s [RAISE philosophy](#) and emphasize the connection between individual behaviours and increased organizational adaptability. **R**esilient + **A**daptive + **I**nnovative = **S**ustainable **E**nterprise (RAISE) is the formula for ensuring successful change management.
3. Feature an organization in a case study that has led a successful change initiative through thoughtful planning and multi-layered communications with its employees.
4. Encourage organizations to start focusing on (and investing in) the time and effort required for true change management. This is what creates and sustains business performance, results and longevity.
5. Provide organizations (and CPAs) with guidelines on how to approach change management from a human-centered design perspective rather than from a pure process perspective.



How emerging trends impact your business

Traditionally, organizations have used formal change management practices primarily for large, highly visible projects (e.g., organizational restructuring, mergers and acquisitions, implementing new enterprise resource planning [ERP] systems). Even now, change management is often considered to be only one of many elements in project management but, because of the growing need to manage people through change, it has now become an entirely separate profession. Organizations have supported this new profession, often seeking external expertise to assist them in implementing and sustaining transformational change initiatives.



In today's volatile world, organizations experience change on a daily basis. Issues like climate change, global economic and political instability, the growing use of artificial intelligence, and societal change only complicate how we live and what we expect from the environment that surrounds us.

Many organizations are having to create change management processes, plans and communications. A common example in our current business climate is the proliferation of organizations currently looking at work-from-home arrangements for their employees.

For some employers, this brought up issues of trust and productivity; for others, a key challenge was around the necessary technology and equipment their employees would require at home. Some employees love the working from home idea; others prefer to work in the office. With every change an organization makes, there are multiple and often diverse perspectives, reactions and emotions to navigate.

Continuing to lead organizations through change initiatives without understanding their impact on people (and not just the customers or the shareholders, but everyone who will be impacted by the change) may provide a temporary fix, but the long-term collateral damage will be consequential. For example, when individuals are in a state of constant change (without appropriate communication or support), they may become less productive or, worse, may leave the organization in search of a less chaotic work environment. Organizational resilience and agility are key assets for business sustainability in volatile times.

The change management field, as a profession, is still in its early days, born out of the project management sector's realization that existing processes and procedures did not have a solution for how to manage people through change. There still isn't one universal solution, largely because the unit for organizational change is the individual, and individuals can react differently to change. As obvious as it sounds, organizations that are starting to look at change as "managed learning" (all change requires us to learn something) are having more success than those continuing to take a project management approach. This MAG will set out guidelines for the managed learning approach.



Building resilience requires cultural investment

Any change management process, regardless of its frameworks or tools, is directly correlated to CPA Canada's [RAISE Philosophy](#). This philosophy incorporates the best elements of change management philosophy. Successfully enacting or implementing change is not possible without a certain level of organizational and industry resilience, and that requires a long-term commitment by an organization's leadership.

Building resiliency does not happen overnight. It requires consistent and thoughtful investment into an organization's culture, learning from past errors, maintaining a clear (and realistic) vision for the future and promoting honest and transparent communication. Many external factors (e.g., an economic downturn, societal changes, global pandemics) can challenge an organization's resiliency. Organizational culture is a moving target: Just because you feel you have achieved stability does not mean you can become complacent or discontinue efforts to ensure a positive culture.

Unlike project management, where an organization is implementing a change (e.g., a tool, system or structure) that will either solve a problem or allow further growth, change management's resilience is all about the inner resilience of the individuals who are responsible for leading and implementing that change. Building greater resilience in employees will safeguard your people and allow them to focus on the work, as opposed to getting lost in all the "noise" that accompanies organizational change. This will in turn lead to more adaptive behaviour as people will be able to focus more on the future and less on the past, drawing on their toolkit (and modelled through the behaviour of leadership) to embrace change.

Flexibility is an essential element in the "managed learning" approach to change. Change is a continual learning cycle, whether it involves technical training in order to achieve the desired result or learning about one's own behavioural reactions to change. You cannot have an adaptive organization if you do not support learning and growth on an individual basis. You also cannot have an adaptive organization if you have not put the necessary culture and systems into place to encourage and develop new ideas, productive conflict, and recruitment of the right talent.

Creating resilient and adaptive organizational cultures requires organizations to foster a love of learning and an organizational growth mindset. Being open to failure (i.e., learning) and subsequently analyzing the lessons learned is essential. This is the groundwork for innovation.

When it comes to effective change management, innovation is often the catalyst. Sparking a new idea or improving an existing product or service will invariably benefit the business in the long run. The ideas generated through creativity and innovation go nowhere without the actual implementation of those same ideas. It requires additional reflection, planning, and collaboration to effectively create value from innovation.



Change management presents an opportunity for CPAs

There is enormous potential for CPAs in the field of change management. Broadening their focus beyond the organization's finances and integrating change management techniques and processes will make CPAs that much more successful at influencing others and achieving buy-in for their proposed changes. Understanding how individuals process and react to change will make any CPA a more effective leader. From an organizational perspective, CPAs can use their influence and knowledge of the business to demonstrate how crucial change management is to the sustainable future of their organization. CPAs should also take care to avoid missing valuable opportunities during periods of change. Here are a few examples of some missed opportunities:

- updating a major IT system or process, but failing to use the opportunity to address the dysfunctional internal structure within the department that blocks agile decision-making
- a major organizational restructuring that fails to create more internal collaboration
- a leadership change that does not involve an organization-wide review (and possible “reset”) of culture, values, mission, and vision
- a corporate merger that fails to capitalize on “new” employees and processes to improve their organizational agility and innovation

Many people fear change. It can be uncomfortable, and it's often perceived it as a threat. Organizational leaders must remain open to feedback (both internal and external) in order to be responsive to the needs of both their clients and their workforce.

There can be long-lasting impacts (and even dire consequences) when senior leaders are oblivious to the need for change. An organization in the hospitality industry recently learned this lesson: Its employees had been asking management for more transparent and more frequent communication about future planning and how it might impact their workload so they could prepare themselves accordingly. They had also been asking for additional training in a variety of gap areas and requesting increased support to ensure they were able to achieve the company's expected level of service excellence. Middle management had been trying to support their teams with few resources. Senior leadership, meanwhile, eyed the company's bottom line and maintained its “do more with less” position.

Later that year, the entire site had unionized. Senior management now had to take the time to go through a collective bargaining process and had less freedom in being able to implement their decisions, as they were constrained by union protocols. Unfortunately for the employees, the union had made many promises during the union certification process that it could not deliver on, and the employees did not get the support they had requested.

Senior leaders had missed the opportunity to review employees' requests and determine whether or not they were reasonable. They could have set up a mechanism (e.g., a task force or focus group) to investigate the needs of their employees or clients. Now the company has a union to deal with and disgruntled employees – which is leading to poor service and unhappy guests. It all could have been prevented if management had been more willing to at least consider the possibility of change. Keeping shareholders happy in the short term is rarely a sustainable business practice.



Organizations can no longer expect to keep their doors open if they are not constantly surveying the marketplace to see where they need to pivot. The corporate graveyard is full of organizations who did not adapt to the changing needs of their markets (e.g., Kodak, Blockbuster and Nokia). In a Forbes magazine article in 2011, Steven Denning, the Chairman of General Atlantic, pointed out that in the 1970s, the life expectancy of a firm in the Fortune 500 was around 75 years. Today, it is 15 years or less.

It is readily accepted that adapting to change is essential for businesses. What we don't seem to have a handle on is that while strategic change may be handled in boardrooms, successful implementation comes down to people: the human skills and emotional reactions of the many individuals within organizations.

The humanity of change

The reputed organizational consultant and best-selling author William Bridges, in his groundbreaking book *Transitions: Making Sense Of Life's Changes*, found that the spectrum of emotions people feel during a change experience is wide, vast and unpredictable. While some people may experience transition in a linear fashion, others may find that it is non-linear, meaning that people can experience different emotions at different times. As shown by Bridges' model below, it can also be an ongoing emotional cycle, particularly if the organization (or external factors) contribute to a sense of change fatigue (i.e., a seemingly endless string of unresolved change).



Many organizations overestimate their capacity for change, glossing over important gaps or weaknesses. Organizations that lack trust between leadership and team members (or who have high levels of cynicism) will obviously struggle more through change management processes. While it is still possible to achieve change, it is strongly recommended for organizations to analyze their cultural capacities before taking on a major change initiative. Conducting a cultural audit may illustrate whether or not an organization is able to withstand a change process.

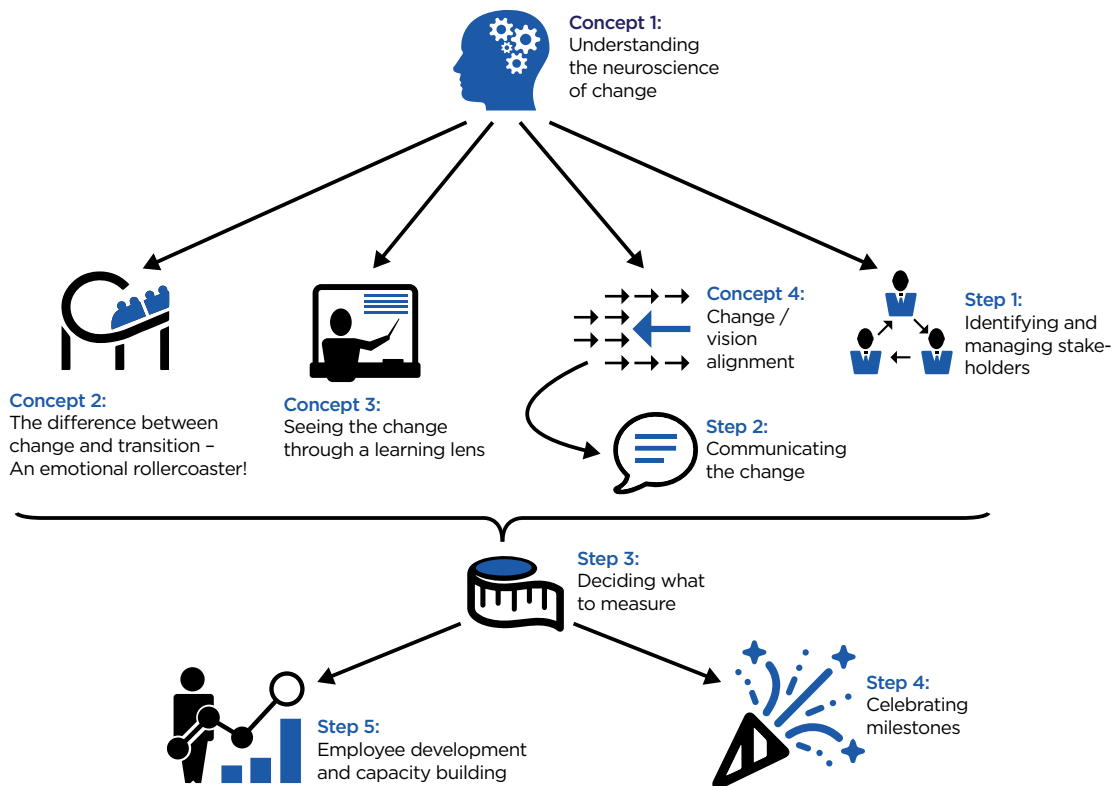
A **cultural audit** is simple and inexpensive to conduct (it is essentially a series of interviews). Depending on the level of trust in the organization, it may be preferable to bring in an external change management consultant to conduct interviews with a group of employees who represent the demographics of the organization. For example, you wouldn't want to conduct a cultural audit by only interviewing managers. You want to speak with individuals from different levels, areas, functions and longevity. The audit should be done with the utmost transparency, ensuring confidentiality within each individual interview. Here are some interview questions to consider:

1. Tell me about your role and length of time with the company (for an external consultant, this helps start the conversation and enables better understanding of that employee's perspective).
2. How would you describe the current culture of your company?
3. How would you describe the company brand? Are the internal and external brands consistent?
4. Is the organization's internal communication effective? Why or why not?
5. What's the communication style? Are there more one-way broadcasts from leadership or are there grassroots conversations?
6. How are decisions made? Is the approach hierarchical or collaborative?
7. How are employees treated? How are they expected to behave day to day?
8. What's the approach to getting work done? Is the emphasis more on group collaboration or individual achievement? Do people pay more attention to methods or results? And are there negative ramifications if work isn't completed?
9. How freely is money spent? What is the money spent on? Do employees feel money is spent appropriately?
10. What's the tolerance for risk? Are strategies more daring or conservative?
11. How is customer service done? What kinds of relationships are developed with customers? And how are complaints followed up?
12. What is the company's vision? What does the leadership want the organization to be? Are they achieving that? Are there specific diversity and inclusion policies?
13. What are the company's stated and implicit values? What is important to the organization? Do you feel that the company values are being represented daily? Provide an example.
14. What structures are in place? These could be physical, technological, or procedural structures.
15. How are desirable actions rewarded? How are undesirable actions discouraged? Is there an employee recognition program in place?
16. How do customers talk about the company? How do they interact with employees?



A People-Centred Process: Overview

There are several well-known change management frameworks (e.g., Kotter, ADKAR) and many lesser-known models available online for reference. We will be focusing here on the actual understanding of change. There is no cookie-cutter approach to managing change. Every individual will experience change differently. This process is about understanding what you need to consider before implementing organizational change.



Concepts 1 to 4 as outlined below are not so much linear steps as they are foundational pieces to any successful change management initiative that applies the human approach. These first four concepts will continue throughout the entire change process and are elements that you can keep coming back to as you move forward through the process. Steps 1 to 5 are more tactical, specific actions you can take to help further the change initiative and create stronger buy-in throughout the organization. Each step will be examined in further detail later in the document; the summary of each step is below.

Creating a successful foundation for change (concepts 1 to 4):



1. Your brain on change: Understanding how our brains work throughout a period of change is key to any successful application of change management frameworks. It is helpful to know for ourselves so we can better lead through change, and it is especially helpful to educate others so that they can understand why they are reacting the way they are.

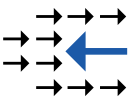




2. The difference between change and transition: Once we have an understanding of how our brains work, we will look at the emotional impact of change. Change is the actual event, or “thing” that we decide we want to do differently. Transition is the emotional process we go through when we have to let go of one thing and move forward with another.

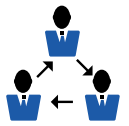


3. Seeing the change through a learning lens: To help individuals adapt quickly, it's important to focus less on “managing the change” and more on “learning” the change. Ideally, you already have a learning culture in place or at least a demonstrated organizational commitment to learning so that this doesn't feel like too much of a departure from your usual culture.



4. Change / vision alignment: This is the stage where the leadership team must align on the purpose of the change (i.e., why are we doing this?), the outcome of the change (i.e., what do we want to achieve?), the desired timeline, and anything else that will be critical to communicating the change to impacted stakeholders.

Tactical actions to implement (Steps 1 to 5):



1. Identifying and managing stakeholders: A stakeholder is any individual or group that is impacted by the change, whether positively or negatively. Identifying all stakeholders before you embark on any change management process is key. Overlooking certain individuals or groups means your communication won't be appropriately targeted.



2. Communicating the “campaign”: How will you message the change? Who will message what? When? If important announcements are being delivered by line managers, how will consistency be ensured? Are there speaking notes? FAQs? Opportunities for input/feedback to help engagement?



3. Deciding what to measure: The most obvious metric is whether the change was successfully implemented. There are other metrics that can be integrated into strategic planning initiatives, employee performance metrics and engagement surveys such as the level of employee engagement in the change, the impact of the change on the overall business, etc.



4. Celebrating milestones: This is an important part of employee engagement and organizational resilience that is often overlooked. It's not just about big wins, it's about the progress made along the way and serves to keep people engaged and moving forward.



5. Employee development and capacity building: Every change initiative offers opportunities to take a closer look at what already figures into the organization's skill inventory, where skill capacity can be expanded (in order to enact the change) and whether the necessary skills need to be recruited externally or developed internally. By linking this part of the process to your organization's succession planning and overall development plans, you are building a stronger organization from within.



Application of the Process to Your Organization

Conceptual approach



Concept 1: Understanding the neuroscience of change

Behavioural self-awareness is key to any successful implementation of change. Our brains can perceive change as a kind of error, if not an outright threat. This has an immediate impact on how we react to the change and our willingness to trust the source of the change, which then impacts the extent to which we are willing to support the change. According to Dr. Rachel Cotter Davis (PhD) and other social neuroscience researchers, because of human evolution and our need to survive, our natural response to change is to see it as a threat. Our “fight or flight” instincts can make us resistant to change.

How this plays out within our organizational environments is fairly obvious. Immediate resistance (particularly to a bigger change that is poorly communicated) is common. How long people stay in that particular “threat” response will differ depending on a number of factors, including: their individual levels of adaptability, resilience and trust; the extent to which the person is impacted; and any stressors in their personal lives.

Through a period of change, the temptation for many leaders (often due to their need to manage many different priorities and deadlines) is to assume, or hope, that eventually everyone will simply get on board with the new reality. This approach does not align with what we now know about how our brains react to change.

Understanding this basic concept of brain science and communicating it to organizational leaders will allow for more thoughtful and successful consideration of how and when to communicate the change (more on this in Step 2). This understanding should also provoke a robust conversation around what kind of resistance leaders anticipate throughout the organization along with strategies for mitigating that resistance. It's quite remarkable how employees' stress levels can be reduced when they understand that their response to change is quite normal and has more to do with how their brains are wired.

A useful tool you can use to anticipate possible resistance is the force field analysis, which was created by Kurt Lewin back in 1951 but is still valid today. It's a simple idea to help in the planning of a change initiative: If you can pinpoint the strongest form of resistance that will act against the change (and focus on getting people to accept what they initially resist), you will weaken the force behind it and increase the possibility of a successful change implementation. Below is an example that shows a force field diagram as it pertains to the relocation of an office.



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Relocation of Our Head Office

FORCES ACTING FOR THE CHANGE

Current building has space constraints that are affecting employee's efficiency and well-being

Current building is older, keeps having maintenance issues and is outdated

New building located in an area with unlimited parking

New building will have more informal - and modern - breakout and collaboration areas

FORCES ACTING AGAINST THE CHANGE

People will lose their offices as we will move to hot-desking

Open space environment will not be suitable to all work styles

Commute will be further for many employees; public transportation is available but within limited hours

Some departments have expressed anxiety about how the space will be laid out

What are the kinds of behaviours you would see if someone is struggling with change?

What questions can you ask to see how people are coping with change?

Coaching questions to ask someone who is struggling with change:

- What is in your control right now to create or influence within your role?
- When you listen to your thoughts and track how you are spending your time, how are you using your energy?
- What will it take to shift your thoughts and actions so that you can focus more on what is in your control?



Concept 2: The difference between change and transition - An emotional rollercoaster!

Most organizations, unfortunately, use a blanket approach when communicating change and do not take into account that different individuals are going to have different reactions to what's being announced. With this approach, you lose the opportunity to truly engage your people around the change. Additionally, transitions don't always occur in a linear fashion, as illustrated by the Bridges model shown on page 5 and again below, and some individuals can experience a real emotional rollercoaster when experiencing change.

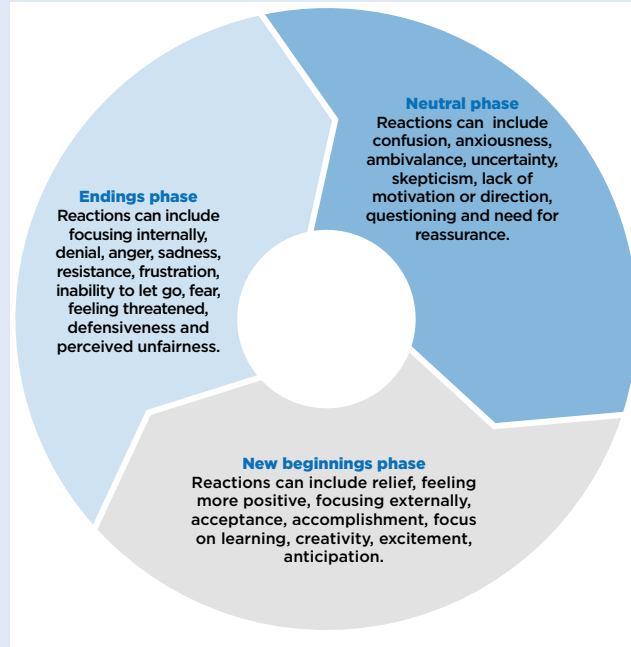
Just because an individual moves into a different phase of their emotional process - whether they are in the endings, neutral or new beginnings phase, as outlined below - it does not guarantee that the person won't move into another phase if triggered or influenced by something or someone. Engaging people in a change process requires consistent energy and focus, often over long periods of time.



Some things to try in each phase to support engagement

Endings phase:

- Share as much information as possible in different ways (e.g., written, verbal, visual), and answer questions calmly and honestly.
- Communicate the change and emphasize the connection to the vision, mission and values of the organization.
- Be honest as to the reasons for the change.
- Be patient and prepared to answer the same questions repeatedly, often with the same individuals.
- Give employees opportunities to process information and to discuss it with colleagues in private settings.
- Keep leadership visible and accessible, and regularly find opportunities for them to connect with employees to ask how they are doing.
- Identify your “change ambassadors” (i.e., those who are positive about the change), and have them help you communicate messaging.



Neutral phase:

- Provide empathetic support for anyone experiencing anxiety or stress.
- Continue to explain and answer questions as requested (patience and understanding are key).
- Continue to communicate the change and emphasize the connection to the organization’s vision, mission and values.
- Create and communicate small goals and incremental steps (and acknowledge when they are accomplished so people feel they are moving forward).
- Have a clear plan of action for the next steps.

New beginnings:

- Celebrate goal achievement.
- Be aware of “pockets of resistance” and how they may be influencing others, particularly if you see people start to move back into the neutral or endings phase.
- Continue to communicate the change and emphasize the connection to the organization’s vision, mission and values.
- If there are any “wins” with the new change that have a positive impact on team members, be sure to make them visible.
- Ensure that people feel they can voice their opinions and provide feedback without repercussions.
- Check in with stakeholders and be able to respond to any of their concerns.





Concept 3: Seeing the change through a learning lens

As noted earlier, many individuals (and their organizations) are experiencing what's known as "change fatigue," when change becomes such a constant in their work - and their lives - that they no longer have the time to absorb one change before another one starts. Change management can be a chore, an unpleasant task to endure, not enjoy. However, shifting one's perspective, seeing change through a "learning lens" (i.e., reframing change as a learning experience), turns it into an opportunity instead of a threat.

It's important to strike the right balance with this type of communication so as not to come across as tone deaf. Organization-wide emails full of excitement, welcoming the change, may not sit well with a stressed and/or cynical workforce. Being honest and realistic about the challenges ahead (and outlining the development opportunities available to different teams or departments in smaller meetings) tends to be more effective. For this approach to work, it is essential for the senior leadership team to model the desired behaviour. Leaders in the organization must demonstrate an early and highly visible openness in actively learning or refreshing the skills that will be required to make the change effective. People aren't necessarily absorbing the message, but they *will* notice how leaders are behaving, which helps build trust and faith in the process.

The more you can build a learning or "growth" culture in the organization, the easier it will become to adjust to change. When people look to new challenges as an opportunity to hone their own skills, and when they recognize that the organization is investing in the change through making themselves more competitive - and therefore creating economic stability for all the employees - any changes introduced under this lens will be seen as chance to do things better. Focusing on the progress, as opposed to aiming for perfection, is an important part of introducing change through a learning lens. Positive reinforcement for the steps that have been taken, however shaky or imperfect those steps may be, encourages the behavioural changes necessary for an individual to embrace the learning part of the process.

Take for example a medium-sized business in the construction industry that had gone through several years of continued growth and increased its workforce to nearly four hundred people. Due to its growth in size and its inability to keep track of employees' performance, the company decided that it needed to implement a more formal and objective performance management system for all employees, which it did with the help of an external consultant. All the company's people managers (from the executive group down) attended training events to learn how to have effective performance conversations with their teams. Every employee in the company was taught to use their new performance evaluation tool.

The company was divided into two divisions. Both divisions went through the training and learned the new tool, but the leadership behaviour was different in each area.

- Division A had a leader who, while supporting the implementation of a performance management tool for all employees, decided that they didn't have enough time to invest in the project and therefore didn't conduct the requested one-on-ones with his leadership team, who in turn had mixed motivation about doing the same with their own teams.

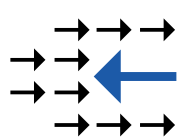


The result was a very “hit and miss” type of program implementation and, one year later, there are still many employees (and managers) who are not actively participating in the performance management process.

- Division B had a leader who had crafted his own performance goals, shared them with their leadership team and had the team present their own goals for feedback from the rest of the group. Division B spent more time with the consultant to understand the possible pitfalls and opportunities that the new process presented. Once the leadership team had crafted its goals and undergone the training, each member of the team had their own performance conversations with their general manager and subsequently began implementing the new performance process throughout their respective divisions. Their commitment to the program was obvious.

One year later, Division B boasted 92 per cent compliance with goal-setting and one-on-one performance conversations and, when surveyed, 84 per cent of the division’s members thought the change had been positive for their work culture and that it had led to the overall increased performance of their division.

Leadership behaviour can either serve as a model for lifelong learning, or make employees question the wisdom of investing their energy and time into developing themselves. It can also make or break the success of a change initiative. It is imperative that leaders clearly demonstrate a growth mindset (i.e., the belief that your basic qualities are things you can cultivate and improve upon through your own efforts). To put it simply, if leaders aren’t willing to learn, grow and adapt to change, why should employees?



Concept 4: Change / vision alignment

There must be a discussion of how the leadership team will be “walking the talk.” If its members are not convinced that the change is necessary, they won’t be able to convince the rest of the organization. Healthy debate must be encouraged, and

ideally the change should align with the organization’s vision, mission and values.

It is much easier to engage employees in a change initiative when the initiative clearly moves the organization toward a well-articulated vision. This fundamental cornerstone of any organization (along with the mission, which answers such questions as why do we exist and who do we serve?) can be used as a compass and decision-making filter. Will this change move us further towards our vision? Who will be impacted? Does the change align with our values?

The leadership team must have honest and balanced conversations with each other, ensuring each member has an opportunity to voice their ideas, perspectives and concerns before moving forward with a change initiative. Too often a major organizational change is driven by an operational need and run entirely by one department with little input from other areas. This makes the communication phase choppy: It’s often full of holes and missed opportunities (such as the chance to engage in cross-functional collaboration).

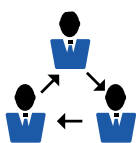


Leadership teams that talk to one another – and can see beyond their own “silo” – are more likely to be agile, adaptable and resilient. During the COVID-19 pandemic, resilient organizations were able to pivot quickly, continuing to honour their respective visions and values while completely changing their product. In spring 2020, for example, Bauer temporarily turned its production efforts from hockey equipment to face shields in an effort to support frontline healthcare workers. The company repurposed its production lines and kept its employees working. This gesture of teamwork was not only good for public relations, it also directly aligned with the company’s mission and brand.

Here are some sample questions to ask within the leadership team to help members see the change through a learning lens:

1. What kind of experience do we want to create for the team and organization?
2. How do we want to grow as leaders?
3. How do we want and need our teams to grow?
4. What are our organizational values and beliefs, and are they clearly aligned with the change we need to implement?
5. Do we have the necessary trust and culture to make this a successful change implementation? If not, what actions are we able and willing to take?
6. Where are there ongoing and upcoming opportunities during the change?
7. What are the ongoing and upcoming challenges going to be?
8. What kind of support do we need from each other to successfully fulfill our roles?
9. What kind of support do we need from our teams? Do we think we will get that support?
10. How do we need to be held accountable in order to accomplish what needs to be accomplished?
11. How can we hold the team accountable? What are our measures of success?
12. What kind of daily behaviours do we need to see from the leadership team and from employees for this change initiative to succeed?
13. What are the non-negotiables (e.g., client asks, deliverables, results, logistics) that we need to communicate about the change initiative? Where do we have flexibility to give team members more control?

Tactical approach



Step 1: Identifying and managing stakeholders

Before planning any change campaign, the change planning team should evaluate their stakeholders in terms of how much influence they hold, how much impact they can have and what they anticipate these stakeholders’ reactions to the proposed change will be.

It’s imperative that the leadership group have a widespread, collaborative conversation when they are identifying stakeholders. Taking too narrow of a perspective will certainly overlook particular individuals or groups that may be critical in the overall engagement process. Even groups or people who may not be directly impacted by the change but who are highly influential and have strong followership (e.g., unions) must appear on the stakeholder management plan.



These conversations are usually more effective if they take a visual approach. Mapping out the proposed change from beginning to end in a stakeholder meeting, on a whiteboard for example, will allow due consideration of each phase. New stakeholders may emerge later in the change process, while others may become less prominent as the process moves into a different phase. Updating the original change plan accordingly is a necessary part of this step.

A simple technique known as “rapid listing” can help with identifying stakeholders. It requires your change planning team to list all the stakeholders they can think of (creating these lists first individually, then in pairs, then in groups of four) within the context of the proposed change.

Once the full list of stakeholders has been identified, **influence mapping** can begin. This activity will help define communication plans with each group.



Step 2: Communicating the change

It will only be possible to craft an effective communications plan for the change if you have completed the previous steps in this process.

When discussing how to communicate the change, you must consider both the message and the means of delivering it. A plan that ensures the consistency of any messaging throughout the organization is key to engaging employees. Because there can be a certain level of discomfort around change, you should not wait until the plan is finalized to begin communicating with staff. By the time you’ve considered your plan final, there may already be rumours of the change throughout the organization, which can lead to pre-formed opinions that will be hard to reverse. Here is a sample list of questions to guide discussions and decision-making:

1. What is the change?
2. Why is it happening (e.g., its purpose, objective, context and outcome)?
3. Why is it happening now?
4. Who will be impacted (externally and internally)?
5. How will they be impacted?

It is crucial to recognize the varying degrees of influence each stakeholder will have on your change implementation process. A diagram known as “stakeholder radar” allows you to visualize this by plotting stakeholders in the appropriate segment (then moving them around as needed). Depending on what type of change you are implementing, you can often categorize your stakeholders into four key areas: governance, customers (internal / external), influencers and providers. Once you have decided who fits into what category, you can then decide which of the following categories they belong in that inform the four corresponding circles on your stakeholder radar: V = vital to engage; N = necessary to engage; G = good to have engaged; or C = courtesy to inform.

Stakeholder radar for influence mapping



6. When will they be impacted?
7. How does the change align with the organization's vision, purpose, mission, mandate and values?
8. What are your expectations of employee behaviour throughout the change? What are your expectations of leaders?
9. What phases or steps will occur throughout the change (e.g., what happens now and what happens next)?

It will be crucial to determine who the best individuals to communicate the change are. Credibility, authority, likeability, influence and leadership should all be taken into consideration. Also worth considering is the question of who communicates what to which group of stakeholders.

Some communication tips:

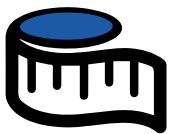
Email - This method is useful when you need to reach many people simultaneously, but it lacks a personal touch and can be misinterpreted (it is advisable to plan a follow-up opportunity for people to ask questions and clarify any areas of confusion).

Video messages - Ensure that physical spaces are available so people can watch in groups and follow up in a meeting with their team leads in case of questions.

Cascading meetings - These should take the form of town halls with the entire organization, *directly* followed by team meetings in each department, followed by one-on-ones (if necessary). Town halls on their own can leave a lot of questions unanswered and can create fear and gossip, particularly if employee engagement and trust are already low.

It is far better to anticipate and over-prepare communications than to do it poorly and spend weeks or possibly months getting people back on track. Timing is also important: Do not wait for the plan to be perfect to begin communicating about the change. Give people smaller details or facts that are clear and honest, making clear that the specifics about the bigger-picture plan moving forward remain flexible (what looks good in a spreadsheet or flowchart doesn't necessarily work out exactly as planned).

As an example of timing, an insurance company in Canada had recently (and confidentially) acquired a slightly smaller firm. Its CEO and CFO worked on a plan for a seamless merger of the two businesses, but were unwilling to announce it to employees until the plan was finalized. By the time the two leaders were ready to make an announcement, many employees thought it was going to mean the end of their employment and others were already sharing rumours about the incoming group of employees and the perceived difficulties they were going to cause. It took a lot of time and effort before employees eventually trusted the messaging and the plan that was finally released.



Step 3: Deciding what to measure

As with most things within organizations, change must be measured. The most obvious metric is whether the change was implemented successfully. There are other metrics such as financial goals, service or product improvements, response times and employee productivity levels - just to name a few - that can easily be integrated into processes like strategic planning initiatives, employee performance metrics and engagement surveys.



Decide what you want to measure both through the implementation of the change and in the time following the change (i.e., the “sustainment” phase). What will be the milestones or signposts along the way that indicate success? How will you know if you are hitting your goals? Scheduling regular “change check-ins” with key teams or individuals may be necessary.

For longer, organization-wide change initiatives, you can rely on existing structures and systems to measure success and hold people accountable. For example, you can embed both tactical goals and goals that require behavioural change directly into employees’ performance plans. If you have implemented employee engagement surveys, adding a few questions about the change initiative could provide valuable feedback – and it will show that management is listening.

Be clear on the *desired* final outcomes of the change initiative (knowing that expectations and goals will certainly require adjustment along the way) as well as the realistic timeline, and then work backwards to create the necessary measurement structures.



Step 4: Celebrating milestones

Celebrating milestones is an important part of employee engagement and organizational resilience that is often overlooked. This isn’t just about the big wins, it’s about the progress made along the way.

We’ve noted that many organizations are currently experiencing “change fatigue,” and this sentiment has taken on heightened meaning both in Canada and across the globe with the changes imposed by the COVID-19 pandemic. More than ever, employees feel overwhelmed by the amount and pace of change. Sometimes people feel like there is never a moment to hit the pause button and absorb what they’ve been experiencing over the past weeks, months or years.

Acknowledging and celebrating milestones can help. Collectively looking back on the journey – acknowledging the challenges and celebrating progress – allows people to feel a little more grounded. It is also comforting to hear about the experiences and emotions of others. Change can be a highly isolating experience, with people often thinking that they are the only ones feeling a certain way.



Step 5: Employee development and capacity building

Every change initiative offers opportunities to look closer at how the organization’s skills inventory looks, where skills and knowledge capacity must be built to enact the changes and whether those skills and knowledge need to be recruited externally or developed internally. Linking this part of the process to the organization’s succession planning (and to its overall development plans) makes the organization stronger from within.

This is less of a “final step” and more of an underlying opportunity throughout the entire change process. A **cultural audit** and a **skills inventory** are two activities that will help determine whether or not the organization is ready for change, whether or not people will embrace the change and whether or not employees have the necessary skills to implement and sustain the change.



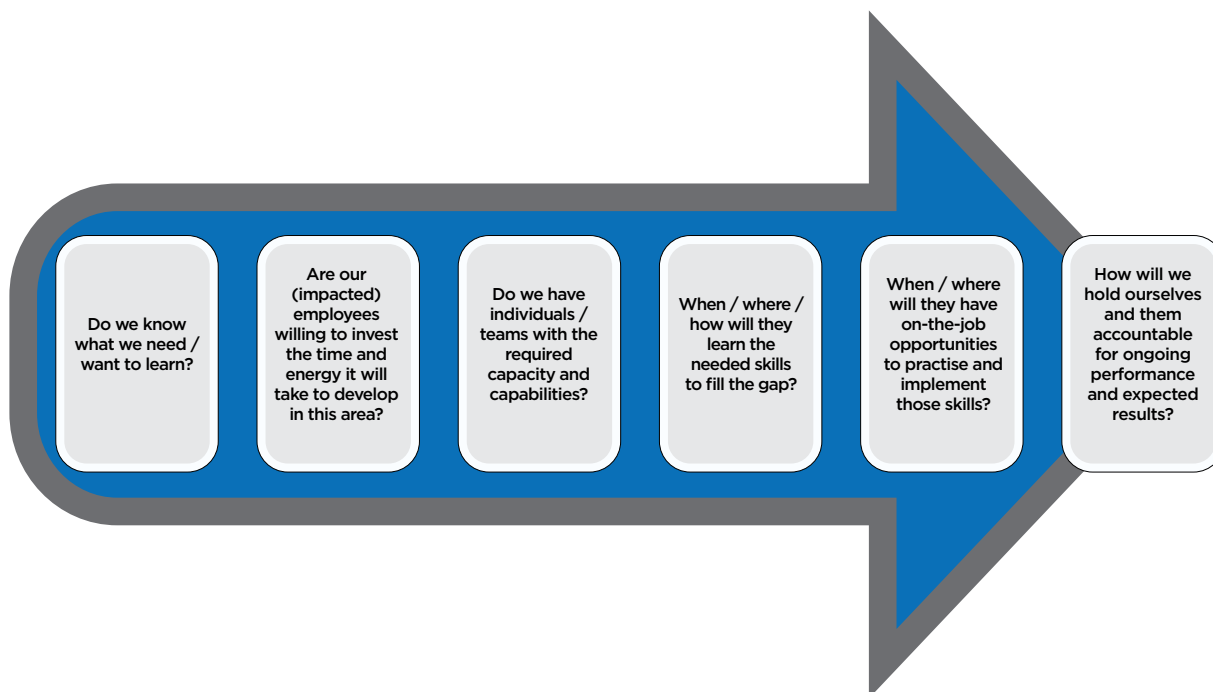
It may be necessary to implement employee development at any stage of the change process, this is an especially helpful opportunity to look at the bigger picture of the organization's talent needs and create a strategic plan for long-term skills sustainability and engagement.

If we take the approach that all organizational change is simply managed learning, employee development and the overall talent engagement plan must be an integral part of every aspect of the change management process.

For example, when a particular group or department is looking at the tasks required to make the change happen, you can use this opportunity to review that group's skills and assess whether they have the capacity to develop those skills. The following are good questions to ask:

- Who should own this task?
- Do they have the necessary skill set?
 - If not, do they have the capacity to get there?
 - If yes, what do they need in order to succeed?
 - If no, who else could do it?
- Do we need external support or a new hire?
- Will we need this skill set long-term?
 - If yes, can we continue to provide that skill set in a sustainable way?
 - If no, where else can we deploy this person or team?

Using a diagram such as a development pipeline or a similar chart or process can help highlight the development opportunities that might be possible.



Key Learnings

It goes without saying that the world is not the same place that it was even a year ago. Even if uncertain times pass and we move back into more stable environments, there will still be an intensifying need for inner resilience, resource management and emotionally intelligent leadership. Change and organizational resilience start with the individual. You will be successful with neither if you do not consider the human element.

Start small. Building organizational resilience through effective change management does not require large gestures or big investments. If you do not have the time or resources to follow all the conceptual and tactical steps provided here, try choosing three that you think will do the most good and mitigate the most damage. Simply having a positive intent and creating a people-centered plan will already be an improvement on traditional change management approaches.

External pressures and demands will always be shifting; they may be volatile and out of our control. Building and sustaining positive and supportive organizational environments has never been more important. The pace of change is not going to slow down, so we must learn to see change as an opportunity. When you look beyond the change itself and engage people consistently, you will find that organizational transformation is suddenly possible.



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About the Author

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Named in 2018, 2019, and again in 2020 by *CEO Today Magazine* as one of the top 100 outstanding consultancy experts across the globe, Jennifer Gervès-Keen is a Master Corporate Executive Coach. Jennifer's first book: *Show Up Like A Coach*, walks the reader through how to use coaching skills to become a better communicator.

After 12 years working in France to hone her communication and business skills, Jennifer moved back to Canada in 2005. Through the creation of her business JGK Consulting in 2008, Jennifer's goal was, and remains, developing better leaders and creating and sustaining great organizations.

Jennifer completed her Master's degree in Adult Learning & Development while living and working in France. On returning to Canada in 2014, Jennifer became a certified coach, winning the ICF Prism Award for excellence in organizational coaching alongside one of her clients, a global professional services firm. In 2019, Jennifer received the Certified Change Management Practitioner (CCMP) designation from the Association of Project Managers Group International (APMG).

In an effort to create impactful organizational learning experiences, Jennifer explored neuroscience and its connection to leadership behaviour, now a foundational pillar of all program content and design.

You can learn more about Jennifer and JGK Consulting at www.jgkonline.com.



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