A Three Step Process for Change Management

Define, empower and execute

If your organisation is about to embark on this journey, we recommend thinking of the change management programme in terms of a three-step process. Following this approach, whilst adhering to the guidelines below, will help to avoid common pitfalls and give you the best chance of a successful outcome.

Step 1: Define

In any journey, the first stage is always to know the destination. This is as true for a family road trip as for a change project. Properly understanding where you are right now, where you need to get to, and quantifying the gap between the two is the fundamental basis of any plan.

For not-for-profit organisations, this step helps you to recognise required change in four ways.

Define your purpose

What is the purpose of the services you deliver and what do they mean to your members? What does this mean to your organisation and the wider group of stakeholders? Defining this purpose as concisely as possible helps to ensure that every element is analysed through the lens of member value. This also guarantees alignment with your organisation's broader business goals.

Define and quantify the 'as is state'

Aim to map and document all the current ways of working. The goal here is to acquire a shared understanding of current capability and expectations across the entire operation. Then you must review and quantify the business and customer impact of your current

approach. How much does it cost? Is it delivering value? Where is the waste? What is the cost of risk mitigation?

Define the measurement criteria

Pulling together the findings so far allows you to identify the effectiveness of your current systems and processes. It also provides clues on how to more accurately measure future improvement. Having this information available places metrics around our programme, gives insight into its progress and provides indications as to whether any corrective action might be required.

Define the outcomes

The destination of any change management process is less about what your organisation wants, and much more about what it needs. Having a clear definition of this and using it to prioritise the competing elements of the project is mission critical.

Step 2: Empower

With definitions complete, your next step is to develop and embed self-sufficiency into your change management and continuous improvement processes. This matters because change programmes that really engage with people's hearts and minds always prove to be more successful that those that feel forced.

The key is to provide a simple, effective change management framework and toolkit that can be used by people across your organisation. A step-by-step process for defining and delivering change also helps people understand how to change, not just what to change.

You can harness the time and talents of your teams by involving them directly in four areas.

Identifying

Involve a multi-disciplined team to identify the opportunities for transformation by understanding what they believe your organisation needs.

Mapping

Get their help to bridge the gap between the 'as-is state' and the 'to be state' through their involvement in mapping and documenting current and desired ways of working.

Investigation

Work together to systematically break down problems as a team, exploring options and considering how to measure progress in achieving the optimal solution.

Outcome analysis

For incremental change, a wider group can be invaluable in surfacing, analysing and prioritising change elements. They are also excellently placed to discuss, develop and implement any necessary remedial action.

For a more involved transformational change, the same group has all the experience necessary to accurately quantify opportunities against the cost of waste. The task of mapping future states to develop a technology roadmap and business case for investment also benefit from this wider input.

Step 3: Execute

The final stage focuses on delivering the transformational change that has been identified, quantified and agreed. A proven project implementation methodology is essential and has particular importance here in underpinning a multi-disciplined delivery team.

When working with a technology partner, it is important to understand and plug any resource gaps that exist in the membership-based organisation or in the project team. Regular stress testing of the technology project strategy is key to ensuring it continues to support the delivery of your wider organisational goals.

For your internal teams, you must always provide the support, skills, tools and framework to support each stage of your transformation. Without the requisite knowledge for each step, they will not be able to adopt and support effective transformational change.

Finally, when putting these concepts into practice, you should always implement any incremental changes in the priority order that you defined and agreed earlier. This not only ensures that the team can put their new learnings into practice quickly. It also delivers quick wins that build confidence early in the change process. Keeping your team engaged and motivated is a success multiplier in any strategy.