

CHANGE MANAGEMENT MAY BE THE MOST IMPORTANT PART OF YOUR NEXT PROJECT

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A discussion with Tim Creasey of Prosci.

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Have you ever been through a project that held great expectations but ended up being painful for all involved and didn't deliver the expected results? Of course you have! If you want to improve your chances on your next big change, read on.

I was trained in Change Management (CM) by Prosci® many years ago. It has proven to be one of the most valuable things I ever did in my career. Many of our clients benefit from applying CM concepts in their projects as they pursue new technology and associated process, organization and metrics changes.

Uses of ADKAR

ADKAR® can be used in multiple ways on change initiatives:

- Guide Change Management approach and plans
- Measure change progress
- Diagnose gaps and develop corrective actions
- Engage people managers and senior leaders
- Adopt a common language for everyone involved in the change

TABLE 1: Examples of Technology Projects and CM's Value

TECHNOLOGY PROJECT	RISKS WITHOUT CM	CM'S POTENTIAL IMPACT
Bots (Chatbot, voicebot)	<ul style="list-style-type: none"> • Agents fear they will be replaced • Agents don't speak positively about bots to customers 	<ul style="list-style-type: none"> • Agents see how the bots help them and help customers • Agents promote use
Knowledge Management	<ul style="list-style-type: none"> • Agents revert to old ways (e.g., cheat sheets, tribal knowledge) • Agents don't contribute to knowledge development 	<ul style="list-style-type: none"> • Agents become active users—accessing and contributing
Speech Analytics	<ul style="list-style-type: none"> • Agents fear the system will be used to catch them doing something wrong 	<ul style="list-style-type: none"> • Agents see how speech analytics creates fairness in the QM process
Gamification	<ul style="list-style-type: none"> • Agents are cynical about the intent and don't participate 	<ul style="list-style-type: none"> • Agents embrace the competition and pursue individual and team performance goals
WFM with Real-time Adherence	<ul style="list-style-type: none"> • Agents believe this tool will add unrealistic rigidity to their schedules 	<ul style="list-style-type: none"> • Agents see the technology helps hold everyone accountable and that it will be used with flexibility to the real world
Instant Messaging and Collaboration	<ul style="list-style-type: none"> • Agents aren't sure how this fits with email and when and how to use which communication methods 	<ul style="list-style-type: none"> • Everyone has a clear understanding of when to use various communication methods
Robotic Process Automation	<ul style="list-style-type: none"> • Agents think they are not going to have any control, or their jobs will become mundane 	<ul style="list-style-type: none"> • Agents understand the RPA will reduce their burden on routine tasks, support compliance, help them quickly find information, etc.
Any technology that depends on adoption and usage...	<ul style="list-style-type: none"> • Agents aren't successful at adopting and using the solution • The initiative does not deliver the expected results 	<ul style="list-style-type: none"> • Agents embrace the new tools and changes in how they do their jobs • The company, center, agents and customers reap the benefits!



FIGURE 1: Prosci's ADKAR Model

Awareness	of the need for change
Desire	to participate in and support the change
Knowledge	on how to change
Ability	to demonstrate new skills and behaviors
Reinforcement	to sustain the change

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But don't just listen to me! I reached out to **TIM CREASEY**, Chief Innovation Officer at Prosci, a leader in CM solutions, training, tools, and best practices, to share his thoughts on CM for contact center professionals. This article will weave together my experience with CM in contact center projects and Tim's expertise in CM applied to our world. (SEE TABLE 1.)



Defining Change Management

Change Management has come a long way in the last 10 years. I often find clients have a methodology and some staff who are trained in CM. Maybe they have applied CM at some level in their projects. But it is not yet a universal practice like project management. Let's make sure everyone understands what we mean when we say CM.

BOCKLUND: Tim, what's your "elevator story" answer to the question, "What is Change Management?"

CREASEY: Our technical definition of **Change Management** is "the application of a structured process and set of tools for leading the people side of change to achieve a desired business outcome." At Prosci, we emphasize it is both a process and a competency. Change Management is how we prepare, equip and support our people on their own successful change journey so that our projects deliver the people-dependent return on investment.

BOCKLUND: Can you share a bit more about the process and competency messages?

CREASEY: The process part is about applying structure and intent on initiatives to move the people side of change forward,



similar to what people use with project management to move the technical side of the change forward. The competency part means that each individual in the organization, whether a change practitioner or a line manager or a CIO, can grow their own personal skillset at driving change from wherever they sit.

HERE'S A LINK TO A VIDEO, "What is Change Management?" <https://www.youtube.com/watch?reload=9&v=e4jnFqIUmmM>

My Favorite CM Concepts

I am an engineer by training and like to solve problems and drive projects to tangible outcomes. Jeff Hiatt, who founded Prosci and created the Prosci ADKAR® Model, was similarly trained in engineering. As he looked at why projects failed or fell short of expectations, he recognized it wasn't the technology or the processes, it was the people not adapting to and embracing the changes being introduced. So, he studied the problem and created practical tools, based on a lot of research. Tim and the rest of the Prosci team have continued that legacy.

Three concepts Prosci created are invaluable to any project:

1. THE PROSCI ADKAR MODEL

The ADKAR Model (SEE FIGURE 1) is perhaps the most powerful tool in the CM arsenal. Everyone "gets it" and can quickly apply it to individual change scenarios. Read the book ADKAR (a fun and easy read!) or take advantage of some of Prosci's website resources to learn the concepts (SEE SIDEBAR). I always tell people: ADKAR will provide great insights when it comes to understanding why your family members or coworkers don't always behave like you want them to! Bonus: It helps you understand your own approach to changes, as well.



BOCKLUND: Tim, can you provide some insight on what makes the ADKAR model resonate for so many people? What's the "secret sauce" in this relatively simple concept that has such staying power?

CREASEY: I would highlight two pieces. First, we all experience change and know it can be difficult. ADKAR provides a key to addressing that very familiar challenge.

TABLE 2: Prosci's Five Levers and the ADKAR Model

"LEVER"—INCLUDE THESE IN YOUR PROJECTS	HOW IT HELPS—APPLIED TO THE ADKAR MODEL
Communication Plan—Defines who is sending what messages, via what channels, at various steps in the change journey	<ul style="list-style-type: none"> • Builds Awareness • Helps facilitate Desire • Reinforces the change
Sponsor Roadmap—Helps the executives provide ongoing sponsorship by guiding them in the tasks and timing	<ul style="list-style-type: none"> • Builds Awareness • Helps facilitate Desire • Reinforces the change
Training Plan—Outlines the types of training, when to deliver, how to deliver, etc.	<ul style="list-style-type: none"> • Delivers Knowledge • Turns knowledge into Ability
Coaching Plan—Provides guidance to frontline leadership on what they need to do to help the team, as well as individuals	<ul style="list-style-type: none"> • Builds Awareness • Helps facilitate Desire • Delivers Knowledge • Turns knowledge into Ability • Reinforces the change
Resistance Management—Provides tactics for dealing with the anticipated issues and reacting to the unanticipated challenges	<ul style="list-style-type: none"> • Helps facilitate Desire (and mitigate the impact of lack of Desire)

Prosci's Five Levers for Change Management and the ADKAR Model—used with permission

Second, while there are many approaches available, ADKAR makes progress accessible. I like to say it lets you “name it to tame it”—as you understand the blocks of successful change you can unlock change challenges. It is a simple yet powerful tool that people can immediately grasp, and it gets more powerful the deeper you get into it.

If you want to do some deeper learning about ADKAR, here are two great resources:

WATCH: https://youtu.be/L_7I03LOyyk
OR READ: <https://empower.prosci.com/the-prosci-adkar-model-ebook>

2. THE FIVE LEVERS

The practical application of CM in projects

means executing tasks that address the need for change and help people make changes and stick with them. Prosci's five levers are great examples of tools and processes that help people do the right things to pursue change. Prosci provides guidance on the levers in training, toolkits and publications. I find they are a great way to push people on projects to do more than the basics like training right before a change and a memo or email going out explaining the project.

CM Applied to Organizations in Our Dynamic World

Prosci has a maturity model that shows five different levels of applying Change Management in an organization, from Ad hoc or Absent at the most basic level, and an Organizational Competency at the highest level. While bigger organizations may be more likely to have formal CM groups, smaller organizations develop the skills and processes, too.

Tim emphasizes that agility is the most important competitive differentiator these days, and it is certainly true that contact centers need to be incredibly dynamic and respond to a variety of strategic and tactical initiatives. Companies need to be able to “out change” the competition. Developing change competency in the organization can lead to more successful, tangible outcomes in these rapidly changing environments.

BOCKLUND: Tim, it seems a key to success with these levers is that they are not one-time events. They are ongoing, multifaceted activities. Can you share some of Prosci's key learnings from your research on how they are most effective?



CREASEY: You're correct, Lori, driving adoption and usage of change does include many facets. Our research shows the greatest success factor is active and visible sponsorship throughout an initiative. People want to hear different messages from different people—the “why” of change

FIGURE 2: Projects Need Change Management



Prosci 3-Phase Process for Change Management—used with permission

from someone at the top, and the “what it means for me” from their direct supervisors. Our research also shows you need to look at what you need to do for the overall organizational change, but you must help individuals with their change journey because everyone experiences change differently. Changes succeed when the individuals involved adapt to and sustain the change. Another key is to build a plan for each lever but also adapt to what is occurring as the project proceeds. We’re dealing with human beings after all, and not everything is predictable!

Tim also emphasizes the link between ADKAR and the levers. ADKAR gives the *outcomes desired*, and the five levers provide the *action required*. **TABLE 2** shows these links.

3. THE THREE PHASES

Any given project will have phases such as those shown in **FIGURE 2**. Change Management has a set of phases that need to overlay the actual project, and in a perfect world, start early in the pursuit of new technology, or changes in processes, metrics or roles. Prosci defines three phases of CM:

1. Preparing for Change—strategy, resources, and sponsorship
2. Managing Change—plans and their execution to support ADKAR journeys

3. Reinforcing Change—analysis and actions to ensure sustained success

The three phases define where and how a center will invest time and resources to align the people side of the change with the technical solution. The processes in these phases really show that CM can’t be an “in your spare time” job. CM needs committed, trained resources every step of the way.

BOCKLUND: Tim, what type of characteristics do change practitioners have? It seems like project management, analytical, leadership and communication skills would all come in handy.

CREASEY: Yes, those are all good attributes. Business acumen and understanding of the change itself are key as well, and empathy is very important. Change practitioners also act as translators between the technical and people sides of a solution, connecting the solution to the day-to-day impact on agents and how they successfully bring that to life.

Tim indicates that Prosci has seen an increase in jobs and career paths aligned with CM. It’s basically a “hot role” these days as companies recognize the importance of applying CM and having resources with these competencies. If you are interested in pursu-

ing a career in change management, check out this recent “Tim Talk” on Prosci’s YouTube channel: <https://youtu.be/ZVg1N9gQOuM>

Making the Case for Change Management

When I try to introduce Change Management into client environments, one issue I have had to overcome is getting them to prioritize it and make it an important part of what they do on a project. Prosci has done a lot of research into and writing on the Return on Investment of CM. It seems nobody feels like they must make a case for project management, but we still see people trying to grasp the value of CM and decide if they should make the “investment” in CM tools, processes and trained resources.

BOCKLUND: What are the most salient points you would emphasize to someone who isn’t sure it’s worth the time, investment and resource commitments to include CM as part of their projects?

CREASEY: Prosci research has shown much greater success meeting objectives and achieving “on-time, on budget” when applying CM. The more complete the CM effort, the better the results. Over 3,500 data points show that projects with excellent CM are six times



more likely to deliver results than those with poor CM, and you get a threefold bump just by going from poor to fair. The case is very compelling because it is all about outcomes. For any project, leaders should ask themselves, “What percent of this project’s success depends on people proficiently using the solution and adopting the process changes?” That helps people connect CM to the actual change and the results they expect; CM is not something else, it’s capturing the people-dependent portion of what I already hope to achieve.



BOCKLUND: So do you think we are on a path to CM becoming as commonplace as PM?

CREASEY: PM has a 60-year head start, but there are many forces at play supporting the case for CM. In the past, companies made big investments in technology and process changes and didn’t get the user response (and therefore financial benefits) they expected. That history of investing without the return is not an option today. In addition, the velocity of change today is like nothing we have ever experienced, and we only expect bigger and faster change on

the horizon. With the reality of more change and greater demand to deliver results, CM is critical. The ability to achieve results depends on how well we prepare, equip and support people in those changes.

The Only Thing Certain Is Change

With so much new technology—and that technology having great impact on the people in centers—there has never been a better time to make CM a part of your projects. Invest a little time in learning and get on a path to making CM a key part of every change your organization pursues. ●

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