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Best Practices to Consider for Creating a Successful Change Management Plan

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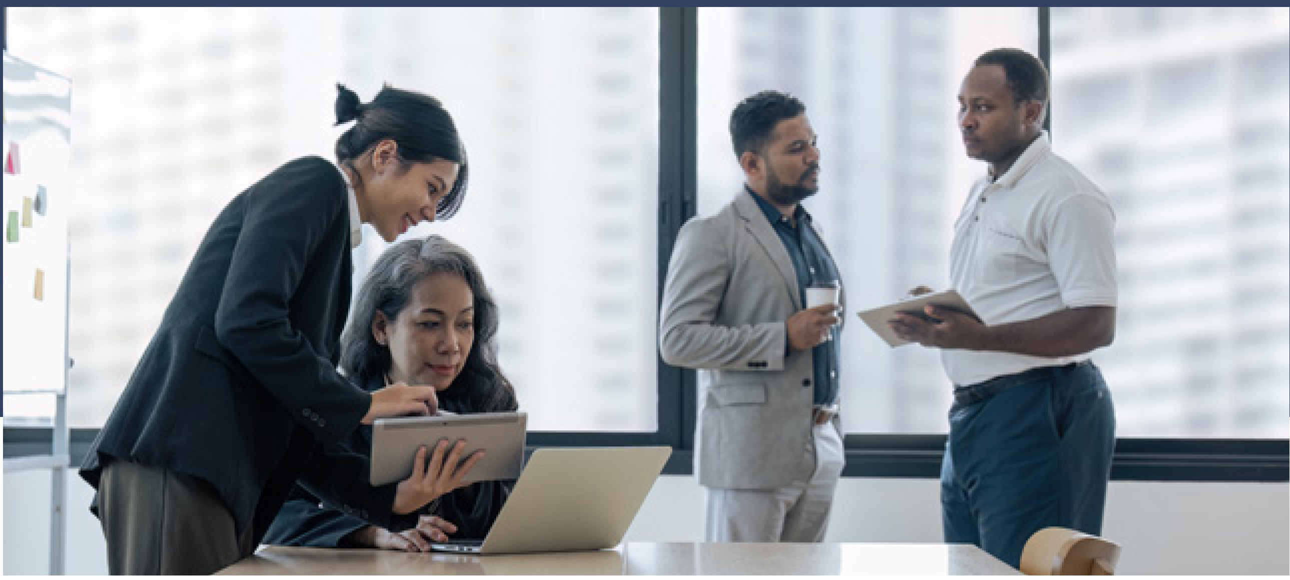
A successful Change Management Plan drives adoption and sustains change within organizations, enabling them and their employees to understand, align, and navigate through periods of transition. The ultimate goal, in most cases, is to ensure the change is no longer the 'new' process, technology, or tool but becomes the norm.

Although not meant to be a comprehensive list, this short article details best practice tips commonly overlooked based on the many organizational transformations TCG has supported.



Best Practice Considerations When Making a Change

Ensure executive and middle management buy-in

One of the most common change management failures stems from poor buy-in from key leaders and decision makers. As part of the change management coalition team, key stakeholders should include members with the authority to make high impact decisions. Not only should they serve as an executive sponsors of the newly proposed program but be active participants on the team. By doing so, valuable time is saved by avoiding planning for activities that cannot be executed, and decisions can be expedited. Additionally, the executive leader can offer a stronger and more influential voice when advocating for the necessary mass mindset shift accompanying any change.

Provide a clear vision and explanation of benefits and potential risks of not changing

When introducing a new change, program, or process people typically ask themselves, “why are we changing” and “how does this affect me.” Addressing these questions upfront is crucial, and they should be communicated with a sense of urgency. Articulating the current versus future state should also include sharing the risks of not implementing the change. This explanation addresses the “why.” Whether communicating to gain leadership buy-in or inform and influence employees or customers, the message must be clear and concise. Ensure your message answers these questions:

- What’s happening?
- Why is this happening?
- What are the risks of it not happening?
- What are the benefits?
- Why should I care?
- Who should this message come from?

The answers to these questions may vary slightly based on your audience. The impact of change on employees, managers, customers, travelers etc. may all differ. Therefore, it is helpful to identify the different personas (stakeholders) affected and tailored messages for each audience. Another important aspect of communication with different personas is the timing and release of information. Different personas may require information at different times based where they are in the transition stages.

Dedicated resources for feedback and training

Map out your transition stages and identify the various activities that fall into those stages. For a technology update, common stages are pre-launch, launch, and post-launch. Yours may be different. Under each stage, map out the activities, roles & responsibilities, and action items required. Most organizations get it right about here. What they then miss is gathering feedback during the different milestones and further misstep by not having the right or agile resources to sustain updates such as new trainings, technological features, new competing priorities, and other unplanned changes. The human experience is fluid. We are not robots programmed to follow ridged pre-determined steps. There will be setbacks. Plan for them. Pre-plan for how your coalition team will answer questions, mitigate risks, and address issues at every stage of the transition of your new program or process. Be aware it may not (or should not) be the same team supporting at every stage. Ensure the team leading each stage, if different, is aligned with the overall goals, understands the vision, and has all the necessary information, skills, and tools to carry forward.

Measure engagement throughout the change journey

Getting a pulse on what is being discussed at the 'water cooler' or if virtual, through chat or messaging platforms is also extremely important. A survey is always a good method to get feedback but unfortunately, it is not always the complete picture. Therefore, implement other ways to gauge adoption and feelings around the change. A few methods aside from surveys include:

• **Focus groups** – meet with specific teams, departments, or randomly selected members for an in-person or virtual meeting to gather their input and feedback.

• **Teams dedicated responding to issues** – gather data from the team(s) receiving complaints and issues. This not only helps to understand what the issues are, but also allows for swift action to find a solution to the problem at the source.

• **One-on-one interviews** – In most cases, we find individuals are more open and likely to share information they wouldn't otherwise share if in a large group. This is why although one-on-one interviews are more time consuming, they can be highly effective.

• **Internal social channel engagement** – If you have an existing social channel like Facebook that your organization uses to communicate internally, use this to your advantage when announcing new updates. Share information, updates, and recognize those that are helping to support the vision and change on this channel. The social channel can provide useful data to monitor and influence behaviors and adoption.

Keep in mind no two programs, processes, or organizational changes are alike.

What worked for one change may not work for another due to timing, resources, cultures, leadership, and host of other factors. However, understanding what to plan for and strategizing through all the obstacles helps mitigate the risks and increases adoption. At TCG, we've helped many organizations transform their travel, payment, and expense programs with our DISEC+ change management and marketing approach. What's unique about this approach is our ability to guide the necessary activities related to travel, payment systems, and expense management and provide full support with cultivating higher awareness of the change through branding and marketing to reach the target audinece, persuade, and sustain program changes.

DISEC+

DISEC+ is a proprietary TCG methodology for achieving successful change management and communication plans and is applied in six phases.

DISCOVERY

Clarifying the vision and mission and how it aligns with the new program. Identify the groups and stakeholders affected by the change.

INITIATION

Identify the change leadership team and change coalition assigning roles and responsibilities.

STRATEGY

Build out the roadmap and change management plan with required activities, marketing assets, metrics for success, training, and resistance management plans.

EXECUTION

Deploy the plan and collect data at each milestone check point. Update the plan or communication assets as needed.

CLOSE OUT

Collect reporting, data and assets. Gather feedback on overall program.

SCALABLE ADOPTION

Continue the updates , dialogue, new trainings, and communication through new or existing distribution channels to sustain the previously launched program.

What is DISEC+? **CLICK HERE**

TCG Consulting can help

Are you planning to update your travel program, switch expense management platform or optimize your corporate card program? Have you recently undergone a merger and acquisition? If so, our experienced team of subject matter experts are here to help. With the application of our DISEC+ change management and marketing model, we help organizations brand their transformations and deliver the right message with a proven strategic plan for sustainable adoption that is, customized for your unique organizational structure and goals.

Contact **info@tcgconsulting.net** to request a change management case study or to schedule a discovery call.

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