



by Phil Buckley

CONTENTS

Part 1: Figuring It Out

Page 2

How Do I Identify What Needs to Change?

Page 2

Part 2: Planning for Change

Page 4

How Do I Know What Resources I Need?

Page 4

Part 3: Managing Change

Page 5

How Do I Overcome Resistance?

Page 6

Part 4: Making Change Stick

Page 7

Change with Confidence

Answers to the 50 Biggest Questions That Keep Change Leaders Up at Night

THE SUMMARY IN BRIEF

Change management is about helping people decide to change successfully. If you have been charged with leading a change initiative, chances are you were chosen for the job — that is, you didn't volunteer but rather were tapped to lead or manage a large change project. You may have been given a short briefing and left to your own devices to succeed or fail in an uncertain, often threatening environment. You may find yourself struggling to adapt your skill set to unfamiliar and anxiety-inducing conditions, conscious that your performance will affect your future career paths.

Change with Confidence addresses the biggest questions that change leaders ask time and again and provides the context, examples and advice to answer them well and to enable successful, sustainable change. Whether you're trying to figure it out, are in the planning stage, are actively managing, or are working to make it stick, you'll find guidance for a wide range of issues.

Although every change has its own circumstances, there are proven processes, tactics and behaviors that lead to lasting success. *Change with Confidence* offers practical, experience-based advice on how to handle the challenge of change.

IN THIS SUMMARY, YOU WILL LEARN:

- How to analyze previous change initiatives to see what worked, what didn't, and why.
- How to find out who can influence your success or failure, help you, or trip you up.
- How to determine what resources you'll need and how to get them.
- How to overcome change fatigue and opposition to change.

THE COMPLETE SUMMARY: CHANGE WITH CONFIDENCE

by Phil Buckley

The author: Phil Buckley is a senior change management professional with over 20 years of experience developing and executing change strategies to achieve aggressive business goals across global businesses in Canada, the Americas and the UK. He has managed 27 large-scale change projects, including co-leading global change management for the Kraft Foods acquisition of Cadbury with a team of 40 change leaders across 60 countries.

From *Change with Confidence: Answers to the 50 Biggest Questions That Keep Change Leaders Up at Night* by Phil Buckley. Copyright © 2013 by Phil Buckley. Summarized by permission of the publisher, John Wiley & Sons, Inc. 251 pages, \$29.95. ISBN: 978-1-118-55655-9. To purchase this book, go to www.amazon.com or www.bn.com.

Summary copyright © 2013 by Soundview Executive Book Summaries® www.summary.com, 1-800-SUMMARY.

For additional information on the author, go to www.summary.com.

PART 1: FIGURING IT OUT

All change projects require you to move people from how they currently think and act to new ways of thinking and acting. The underlying rationale for change must be that it will lead to better performance, but this starting point is rarely enough for people to make them change. They are usually set in their ways and need to be constantly motivated and supported in order to take on new ways of working.

Often, change leaders make commitments regarding a big organizational change before doing their homework. They don't spend enough time understanding where colleagues currently are and where they need to be. Comparing these two positions will deliver a sense of what needs to change (mind-sets, behaviors, skills, processes and systems), how big of a change is required and how difficult it will be to make. In total, assessing all of these aspects of your change project will give you a sense of exactly what you have been asked to do.

The Plan

What Do I Bring to the Project?

Often, people become paralyzed by the magnitude of a big change project regardless of the role they've been given. They compare the project goals with the status quo, become anxious, and allow comments like, "We've never done this before" to fuel doubt, fear and panic. Before this happens, think of what you can draw upon

to help the organization make the change. Based on your initial briefing, what past experiences, knowledge, skills and relationships are relevant to the project?

What Works:

- Note the colleagues you know in the areas of the business experiencing the change. They will give you insider perspectives on needs, concerns and cultural norms.
- Think of what you have in common with the impacted groups. Personal credibility and trust are important when supporting teams through change.
- Review what projects you have worked on and what you learned from them.
- Read past performance appraisals, and record the skills and capabilities you have been recognized for. Ask peers to add to your list.

How Do I Identify What Needs to Change?

Any big change will affect how people do their work. A critical initial step is to thoroughly map out what needs to be different for the change to be successful. This will give you a sense of how difficult your change project will be for individuals and teams to adopt.

It's critical not to underestimate the changes required. Your assessment will directly affect the resources needed to implement change, and misestimating the resources required will lead either to a mid-project request for additional funds (not pleasant) or an understaffed implementation (not wise). Moreover, missed requirements will distract and frustrate your team because they come as a surprise and might put the quality of your plan or even worse your leadership in question.



1-800-SUMMARY
service@summary.com

Published by Soundview Executive Book Summaries® (ISSN 0747-2196), 500 Old Forge Lane, Suite 501, Kennett Square, PA 19348 USA, a division of Concentrated Knowledge Corp. Published monthly. Subscriptions starting at \$99 per year. Copyright © 2013 by Soundview Executive Book Summaries®.

Available formats: Summaries are available in several digital formats. To subscribe, call us at 1-800-SUMMARY (240-912-7513 outside the United States), or order online at www.summary.com. Multiple-subscription discounts and corporate site licenses are also available.

Rebecca S. Clement, Publisher; Sarah T. Dayton, Editor in Chief; Andrew Clancy, Senior Editor; Amanda Langen, Graphic Designer; Jeannette Scott, Contributing Editor

Summary: CHANGE WITH CONFIDENCE

What Works:

- Engage people early in the assessment process so that they feel part of the initiative and take ownership of the change process.
- Make sure someone is accountable for each aspect of the change project. Any unaccounted-for areas either will not be attended to or will be seen as extra work by those who eventually have to handle them.
- Chart the required changes by groups responsible for them. Describe the current and future states in terms of the mind-sets, behaviors, processes and systems that need to change.

What Other Change Projects Are Going On?

One critical factor in your project's success is the amount of change going on when you implement the project. People have limited capacity for change and the extra work that comes with change projects. Generally, the more change initiatives in play, the more challenges a project has to overcome, and each initiative can derail your project as it draws on limited resources and takes up executives' time.

In 2004, Cadbury Adams USA harmonized its enterprise operating system, a major project requiring significant resources. When certain milestones were in danger of being missed, the project team discovered that key people were not living up to their time commitments. Further investigation revealed that most of them had been assigned to projects totaling over 150 percent of their available time. It was impossible for them to honor their commitments. Certain projects were reprioritized, reducing commitments for these colleagues, and additional resources were added where this was not possible. Further delays were avoided by ensuring that sufficient resources were made available to manage the work. Insufficient resources is one of the biggest causes of project failure. ●

Communication

What Is the Water Cooler Talk About Your Proposed Change?

“Water cooler talk” is a great metaphor for what colleagues think and say when not pressured to toe the company line, and understanding such uncensored beliefs will enable you to amplify positive perceptions and refute negative ones.

Addressing colleague concerns in project communications will increase the credibility of your project and the level of trust in the project team. Furthermore, differ-

ences between “water cooler” exchanges and executive interviews will help you assess how in touch leaders are with the feelings of their team members and what views may need reconciling before the project gets underway.

What Works:

- Informally poll colleagues to get an accurate picture of how they feel about the ways of working you intend to change.
- Ensure you have input from every group impacted by the change.
- Quickly dispel any incorrect information, identify areas where there are negative reactions to the change, and provide ongoing opportunities for people to raise concerns. ●

Getting Results

What Do I Need to Know Before I Commit to Deliverables?

Big change projects are rarely managed in perfect conditions. You need to ensure that the expectations of the various team leaders are aligned with the conditions surrounding the project by weighing the deliverables against the level of change involved, resource availability and the environment in which the impacted colleagues are working.

What Works:

- Ask your stakeholders, your team and yourself, “What has to be true to be successful?” Then gauge how aligned these requirements are with the environment in which you're working.
- Confirm the amount of decision-making power you will have in the project. Your degree of autonomy will impact the outcomes you can realistically sign up for.

How Do I Measure Success?

Defining how success will be measured is critical at the start of your project. These metrics will measure how your change project is performing, along with you as a leader.

In 2000, when Cadbury Chocolate Canada acquired Trebor Allan, the newly merged company became the largest confectionery company in Canada. The project team had combined the two businesses as planned, but after 14 months, it was missing its goals. A new leader asked the team if the merger was successful, and the members said, “yes.” He then asked, “How do you know?” Since the team had not identified specific measures of success for the merger other than annual financial targets, members could only claim that the plan was exe-

Summary: CHANGE WITH CONFIDENCE

cuted (citing anecdotal evidence), which didn't answer the question. The silence in the room was palpable.

Defining clear and obtainable metrics will confirm your achievements, simplify reporting, and provide you with data to verify when the project is on track or when remedial actions are necessary. Once you have all the information required to get your head around the project, you need to review everything you have discovered to make sure that the change will achieve the desired outcomes. ●

PART 2: PLANNING FOR CHANGE

Once you have finished “figuring it out,” you have to develop a sense of the nature of the change and a set of expectations for deliverables and create a plan that defines how you will transition colleagues and the business through to your desired post-change state. This involves breaking down the change into sequenced activities, defining the resources required to implement them, selling the plan to your stakeholders, and communicating it to your organization.

The Plan

What Does a Good Plan Look Like?

It is far easier to implement a change once you have a strong plan to guide your actions — a detailed plan that maps out the project activities and provides a framework for leaders and the project team to follow. It should operationalize the project charter and include details on deliverables, budget, resources and timelines.

What Works:

- Create a project summary to test your understanding of details and to guide the project's shape before others try to do so. You don't want stakeholders planning for you or spending time assessing other people's ideas.
- Allow for flexibility in implementation, and leave the minute details to the teams that have to make the change.
- Calibrate your plan with the resources available to deliver it. Don't take on what you can't deliver with your project team.

The following topic areas will provide a solid basis for your plan: context/background, objectives, scope (in/out), outcomes/deliverables (including measurements), approach (required changes to behaviors, process, capabilities and technology), assumptions, risks/interdependencies, governance, timeline, resources and budget.

What Governance Is Required to Run the Project?

“Governance” in this context means the managerial rules that guide how work is done. Structure and order are necessary at the start of a big change project: people need to understand how their roles contribute to the project and what is expected of them. Establishing how the project will be governed is the first discussion you must have with the leadership team or project steering committee (which may include additional people who can guide and support the project). Fight hard to enforce principles, and be flexible about everything else.

What Works:

- Demonstrate governance in a visual format as doing so shows how things are connected and is easy to understand.
- To ensure leaders are clear on decision rights, present real-life scenarios to demonstrate how decisions will be made and what the consequences of potential decisions will be. Outline who has input and who makes the final call. ●

Resources

How Do I Know What Resources I Need?

It is critical that you dedicate sufficient time to map out the number and types of team members you need. You also have to fight for required resources at the beginning of a project as the fight gets harder and more stressful when additional resources are needed mid-stream. Cutting corners in a budget might look good on paper, but doing so rarely delivers the outcomes you need.

What Works:

- Create a resource plan that identifies the number and type of resources your change project requires. It is helpful to link these requirements to your impact assessment and to document the qualifications required for each role. This resource plan will support discussions with leaders, and trade-off scenarios can be explored if the business can't accommodate your recommendations.
- Secure enough resources so that you don't compromise stakeholder management. If you're working on the activity-level details, you will be distracted from this important leadership role.

Building the right-sized team with the right skills is critical to your change project. It must be large enough to complete planned tasks but not so large that roles overlap and team members become idle. With the right

Summary: CHANGE WITH CONFIDENCE

team in place, you can consider what skills are required for you or someone else to manage the project.

What Makes a Good Project Manager?

The project manager has the greatest impact on day-to-day project operations. He or she must have the organizational skills necessary to construct and manage the project plan, be able to uncover missed tasks, have the relationship skills necessary to align and influence diverse stakeholders, and have the critical thinking skills to solve problems. Also, this individual needs to be able to courageously tell the truth and demonstrate grace under pressure in times of difficulty.

What Works:

- Select someone who has past experience working on a project team. This experience is essential to understanding the natural flow of big projects.
- Select someone who is a good listener, facilitator, negotiator, mediator and motivator.

A good project manager is like a modern-day Renaissance man or woman who draws upon strong technical and people skills to maintain momentum regardless of circumstances. They are quick to diffuse concerns and solve problems so that the project does not get bogged down or go off track. With the project manager in place, you can start filling key project roles. ●

Communication

How Do I Get Leaders to Personally Commit to the Project?

Leaders can make or break a big change project. Given the power of their positions, they can reward the behaviors and actions they support and punish those they don't. Without their full support, a project has little chance of succeeding.

What Works:

- When you do get agreement from the leadership team members, thank them for their support and reinforce that the project is owned by all members of the team.
- Get the head of the organization to commit to your change project and to share with the leadership team members the reasons why he or she did so.
- Establish roles for leaders that keep them busy and visible. Keep them active on your project.

How Do I Describe the Better Future My Project Will Bring?

The best future visions appeal to the hearts and minds of colleagues. Winning over hearts ensures personal

investment and engagement; winning over minds ensures alignment with the need for change from a business perspective. Individuals need to see themselves having roles in the future picture you create, and the company rewards for creating change need to be seen as their rewards.

What Works:

- Establish a connection between your change project's vision and your organization's overall strategy.
- Discuss how the change will impact customers, consumers, suppliers, government and the community.
- Communicate through stories and metaphors. People learn through simple narratives and around goals, challenges, actions and outcomes. ●

PART 3: MANAGING CHANGE

Once you've created your plan and it's been approved, you need to take action as quickly as possible. Ideally, you will implement your plan as it has been written, completing each activity and achieving each milestone on schedule. What typically happens, however, is that roadblocks appear along the way, changing timelines and the sequence of events. You will need to marshal your resources to address these challenges while managing stakeholders to ensure they remain supportive of the project and your leadership. You'll need to ensure your team has the resources it needs, inform and coach stakeholders, and resolve issues.

The Plan

How Do I Manage My Day Job, a Change Project and Life?

High-performance individuals usually fall into the trap of trying to do everything and either fail to do so over time or maintain everything poorly. They find it hard to focus on the task at hand because they are so distracted by everything else they must do.

Leaders who successfully balance their many life roles tend to develop mechanisms to keep on track. Although each one is different, they hardwire priorities into their schedules and ensure that the important things in their lives are honored and done first.

What Works:

- Assign many of your day job tasks to team members as soon as you are assigned to lead a big change project.

Summary: CHANGE WITH CONFIDENCE

- Create a to-do list with all of the different aspects of your life represented.
- Be selective about the meetings you attend. Consider sending a team member to represent you if there's not a specific reason for you to be there.

Change leaders need to plan their schedules as rigorously as their change projects. A reasonable life balance will help you stay focused on all of your priorities.

When Is the Organization Ready for Big Change?

You need to be confident that all parts of your organization are ready to take on new ways of working. If people aren't fully prepared, they will revert back to old ways of doing things, which in turn will probably lead to business disruptions.

What Works:

- Get leadership teams to sign off on the questions that will be used to assess readiness for the change.
- Ask leaders the following “killer questions”: What have you personally done to prepare your team? How have you prepared your team to be aware of risks, to know what to do if things go wrong, and know how to trigger contingency plans if required?
- Ask colleagues the following “killer questions”: What should we be worried about? Are issues getting the right level of attention? How confident are you that you will be able to perform your job on the appointed date?

How you prepare colleagues to take on new ways of working must be a core element of your project plan. ●

Resources

How Do I Get More Resources If I Need Them?

Creating a resource request process based on predefined criteria will increase the probability that you will receive approval, and building these requests into project governance will change the focus of the conversation from “Why didn't you know?” to “What is the business need?”

What Works:

- Include a protocol that states you will review project resources at the beginning of each phase.
- Create a process for reviewing resources based on assessing opportunities and risks.
- Include a fact-based rationale for each resource request. This should include opportunity realization, risk management and new scope accommodation.

How Do I Keep the Project Team Energized?

Big change projects tend to exact more emotional strain than nonproject roles. There is constant pressure to drive forward on a difficult course that is heavily monitored. It is essential to balance the negative effects of stress with positive recognition, opportunities to recharge and rewards. Acknowledging people's efforts and pacing their work will give them the energy needed to succeed over the long haul.

What Works:

- Be as energetic and optimistic as you want your team to be.
 - When faced with problems, show confidence that the team can solve them, and reinforce the idea that teams win together.
 - Pace your team so team members don't burn out. ●
-

Communication

How Do I Overcome Resistance?

Identifying the reasons for resistance — everything from passive compliance, indifference or apathy to outright sabotage — and addressing them up front will neutralize these roadblocks.

What Works:

- Discuss potential reasons for resistance with colleagues when you describe the project vision to the organization, and reinforce the positive benefits of the change.
- Build in as much certainty as you can — what is going to happen and when, what aspects will change and what will stay the same, and so on. Reduce stress and fear by reducing the unknown.
- Identify “early adopters” who support the change. Ensure they have the necessary information and are invited to forums where they can influence other colleagues.
- Avoid publicly challenging people who show resistance.

What Do I Do When I Don't Know What to Do?

Your career is on the line when managing big change projects, and you will be positively regarded as someone with future potential if you demonstrate grace under pressure. How you manage difficult situations will be remembered long after people forget what you did.

What Works:

- Keep calm. Acts of desperation imply that the situation is out of control and you are not in command of it.

Summary: CHANGE WITH CONFIDENCE

- Keeping people busy on doing the most important things will avoid distraction and maintain performance.
- Assign responsibility for gathering data you don't have, and request help from experts who have managed similar challenges.
- Don't blame people for problems, especially in public forums. ●

PART 4: MAKING CHANGE STICK

As a change leader, your role is to ensure that plans are in place so that the change lasts. If this doesn't happen, it's likely that old ways of working will seep back into the business, you will lose some of the benefits of the change, and the project will not be deemed a complete success.

The Plan

How Do I Prevent the Return of Old Ways of Working?

Old behaviors can progressively reemerge across the business, creating an inefficient and constantly mutating hybrid organization operating on inconsistent procedures. Some leaders ignore evidence of the reemergence of old practices, hoping they will just go away. If not addressed, just the opposite happens, and people will do more and more things the way they used to. You need to reward new behaviors (and challenge old ones) by building them into ongoing organizational processes, including human resources processes such as performance reviews and colleague rewards.

What Works:

- Build the leadership team's awareness of the dangers of old behaviors reemerging, and ask for their commitment to support the new ways.
- Remove access to old ways of working.

How Do I Hand Over Responsibilities to the Business?

The project team needs to transfer its responsibilities to the business operating teams once the new procedures are running smoothly. At this time, the operating teams take over, providing ongoing support activities and controlling future enhancements. A thorough handover process is necessary for a smooth transition between the two teams, and sufficient time for them to discuss project background, new roles and ongoing needs is necessary.

What Works:

- Appoint people responsible for new processes and systems at the beginning of the project, and invite them to checkpoint meetings to build their awareness of project details.
- Create a project handover plan to ensure that the colleagues with new responsibilities are properly briefed, and include in it a checklist itemizing the steps for completing a thorough transition. Track the plan's completion.

A project team's effectiveness in transferring responsibilities to operating teams often dictates the level of long-term adoption of new ways of working. A thorough handover process ensures that new owners of post-launch responsibilities have the knowledge, tools and confidence to complete their mandate.

How Do I Record Lessons Learned?

The project manager needs to drive the process of recording and sharing knowledge so that future projects can benefit from it. Understanding lessons learned helps build change capacity and skill and dramatically improves organizational knowledge on how projects work within a certain culture.

What Works:

- Create a simple "what worked" and "what could have been done better" chart to document lessons learned in a format easy to present to stakeholders.
- Interview all stakeholders and project team members, asking them the following questions: What was difficult to accomplish? What would you do differently? Were there any surprises during the project? How could they have been avoided?

The capturing and reviewing of lessons learned needs to be valued by project and leadership teams. ●

Resources

How Do I Plan for Post-Launch Support?

Experts are often created during a big change project, and finding ways to use these capabilities after the project closes will greatly increase the probability that new ways of working will stick. Also, doing so rewards colleagues who have helped build the business.

What Works:

- Set a concrete end date for the project. At this time, the project team will officially disband and ongoing accountabilities will shift to colleagues in the business.
- Request that project team members take on post-launch duties. They are the most knowledgeable and emotionally attached to the new ways of working.

Summary: CHANGE WITH CONFIDENCE

- Assign people responsibility for each new process. This will ensure accountability for ongoing maintenance, upgrades and education — all necessary, especially in regard to new software packages.

How Do I Reward the Team?

Leaders and colleagues tend to remember two parts of a project most vividly: the beginning and the end. The middle is a gray area that is usually forgotten unless something major went wrong. People have a need to be recognized for their commitment and engagement, and by doing so, you not only acknowledge their hard work but encourage similar efforts in the future.

What Works:

- Hold a final dinner meeting for the project team to acknowledge the hard work of the team.
- Help team members transition back to operating roles. You need to make this a priority because it is the right thing to do and because people will not want to leave their operational roles in the future if colleagues have been penalized for doing so. ●

Getting Results

How Do I Keep the Change Alive?

An effective way of keeping the change alive is to determine what needs fixing or enhancing so that the change works for colleagues and the project realizes its intended benefits (or even uncovers new benefits) and full potential. Each modification should make colleagues' lives easier and improve effectiveness, so the more you can identify, the better the change will be.

What Works:

- Schedule face-to-face meetings to assess how the new ways of working are being adopted and which elements need modification.
- Set up ongoing user groups to manage challenges, record wins, and recommend upgrades.

People who are using the new ways of working are your main source of improvement ideas. They know their jobs and what needs to happen to be effective and efficient. You must provide them with opportunities to share what works and what doesn't, and listen carefully to their recommendations. Many of them will be practical and cost effective. Encouraging feedback and quickly acting on suggestions will motivate people to stick with new procedures.

How Do I Show That the Project Was a Success?

When presenting results, it is best to start with the measurements agreed to at the outset. Facts and data outlined before and after results are the best evidence of goal achievement. Then you can share additional evidence that speaks to the quality and effectiveness of your teams' work. Verbal testimonials from leaders and colleagues also are effective, but without fact-based documentation, you run the risk that these general perceptions may change over time, which can change how the project is viewed.

What Works:

- Hold a final leadership team project review meeting to demonstrate the project's achievements based on pre-set measurements. The most effective reviews are short and tight, conveying momentum and professionalism.
- Create an end-of-project review document that provides an overview of the project — its objectives, accomplishments and lessons learned — and schedule short meetings with all stakeholders not present at the leadership meeting to review project results.
- Ensure that high-level results are communicated to the business. This provides an opportunity for colleagues to celebrate success and reaffirms that change projects are necessary to achieve higher performance.
- Submit your project to an industry awards program. This will provide exposure for your organization and externally validate your team's accomplishments.

Facts and data are critical to showing that your project is a success, but the story behind the success will be remembered long after the numbers are forgotten. Make sure your project's success is broadcast across the organization: It is good for morale and provides another opportunity for your team (and you) to be recognized. After all the hours, days, weeks and months of hard work, it is time to celebrate. ●

RECOMMENDED READING LIST

If you liked *Change with Confidence*, you'll also like:

1. ***Change-Friendly Leadership* by Rodger Dean Duncan.** Learn how you can achieve successful change by implementing the Four Ts of change: Think-Friendly, Talk-Friendly, Trust-Friendly and Team-Friendly.
2. ***The Reinventors* by Jason Jennings.** Jennings uses his research of 120,000 companies to provide 10 rules for reinvention to help leaders move toward a continuous change model.
3. ***Change the Culture, Change the Game* by Roger Connors, Tom Smith.** The authors reveal how to transform your entire organization through each level of the Results Pyramid: Experiences, Beliefs, Actions and Results.