CHANGE MANAGEMENT:
The Role of Strategic Communication
Acknowledgement

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Introduction

This guide provides valuable information that will help your organization to effectively manage change. Our hope is that in distributing this workbook, we at Brighter Strategies can give you the knowledge and practical tools you need to successfully execute a change management initiative within your organization.

The content of this guide is designed to:

1. **Work within your organization’s culture.** Every organization will experience change. However, no two change scenarios are the same. Using your organization’s unique identity and specialized resources is the key to effective change management.

2. **Emphasize continuous quality improvement (CQI).** The journey is more important than the destination; the goal is to continuously improve your organization’s planning, processes, people, and performance. Use this guide on an ongoing basis as you proactively manage change.

3. **Give you take-away tools.** From understanding the change process to analyzing stakeholders and communicating change performance, the practical exercises and informative resources in this workbook will make effective change management a reality in your agency.

4. **Be interactive.** This guide includes a familiar friend who pops up throughout the Brighter Strategies resource guides. The cartoon character Mr. PACE will appear within this workbook to remind you to pace yourself! When you see Mr. PACE, take a breather and use the space provided to reflect, jot down notes, complete an exercise, and, ultimately, apply the learning to your professional context.

After reading and completing this workbook, you will be able to:

1. **Understand change management basics,** including the types, levels, and process of change.

2. **Leverage The Change Cycle** to effectively guide stakeholders through the change process.

3. **Create a four-pronged approach to change** that focuses on planning, people, process, and performance.

4. **Write a change vision and form a change team** to guide your initiative.

5. **Craft a change message** and employ listening and storytelling tactics for strategic communication.

6. **Measure the performance of your change initiative** over time, emphasizing ongoing improvement.

7. **Assess your organization’s change readiness,** and proactively develop change competencies.
Why are you reading this guide on change management? What information do you hope to take away? What do you wish to do in your organization as a result? Use the space below to answer these questions and create your learning plan before you proceed.

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Change Management: The Basics

“The only thing constant in life is change.” —Francois de la Rochefoucauld

In today’s workplace, where “doing more with less” is the new normal, organizational change can be quite disruptive to employees, customers, and stakeholders. Few people naturally like change, and most have difficulty accepting it—both in their personal lives and careers. However, change will never go away, and it is the job of organizational leaders to manage change before, during, and after it occurs.

What is change management?

Change management is the process of helping individuals and the organization to transition from a current state to a desired state. While there are many definitions and models describing this process, when you get down to the basics, managing change is all about effective communication. This guide will explore change management as a communication function.

What kinds of change are we talking about?

Organizational change can be either continuous or discontinuous:

- **Continuous change** is the ongoing adjustment of organizational processes to make existing systems better.
  - Example: hiring a new program manager to provide better oversight to an existing program
- **Discontinuous change** is a major people, process, or business change that requires a dedicated project team to manage it.
  - Example: reorganizing the entire company

Change is either proactive or reactive:

- **Proactive change** is initiated in anticipation of future opportunities or threats.
  - Example: an organization significantly reduces budgetary expenses in anticipation of a tough economic climate
- **Reactive change** occurs as a response to outside situations or forces.
  - Example: an organization is forced to lay off staff when the economic downturn wipes out its stock portfolio

There are several levels of change impact:

- **Transactional** change creates a minor impact.
  - Example: the introduction of a new program
- **Operational** change creates a major impact.
  - Example: a reorganization that shifts department structures and employee roles
- **Transformational** change creates a fundamental impact.
  - Example: a culture change initiative that transforms the organization’s mission, vision, and values
Based on the above definitions, what kind(s) of organizational change are you currently encountering? If you are not experiencing a major change at this time, what potential change(s) do you anticipate in the future?

The Change Curve

Based on a model originally developed by Elisabeth Kubler-Ross in the 1960s to illustrate the grieving process, The Change Curve describes the four stages most people endure as they adjust to change. You also will see these experiences in the stages of proactive and reactive change (see Figure B).

Figure A: The Change Curve

Kubler-Ross Curve Applied to Business Change

Denial
“They aren’t really going to go through with it.”

Anger
“What a waste of time and money. How much do those stupid consultants cost?”

Bargaining
“Fine, but I won’t have time to go on with my other duties.”

Depression
“This really is happening and there is nothing I can do about it.”

Acceptance
“Well, this is how it is, but things aren’t so bad.”

Moving On
“Actually this new set up is better than the old and I can see how I can make this work for me.”
1. **Stage One: Denial**—This occurs when people react to a challenge of the status quo.

2. **Stage Two: Anger**—As reality sets in, people tend to feel angry about the shift in the status quo and fear the resulting impact.

3. **Stage Three: Bargaining**—A lot of bargaining occurs while people are still angry; once their anger dissipates, so does much of the bargaining.

4. **Stage Four: Depression**—As people make the transition from dealing with their emotional reactions to accepting the change, many experience depression.

5. **Stage Five: Acceptance**—People stop focusing on what they have lost and start testing and exploring what the changes mean and how they must adapt.

6. **Stage Six: Moving On**—Acceptance leads to an embracing of change, which means the rebuilding of a new normal.

### Figure B: The Stages of Proactive and Reactive Change

<table>
<thead>
<tr>
<th>Stage</th>
<th>Proactive Change</th>
<th>Reactive Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>One: Initial emotions</td>
<td>Individuals feel excited about doing something new and eager for new learning opportunities.</td>
<td>Change induces shock, numbness, and denial.</td>
</tr>
<tr>
<td>Two: Secondary reactions</td>
<td>A sense of determination drives people to meet new challenges, which result in either satisfaction from an accomplishment or disappointment from a letdown.</td>
<td>Humans often react to disruptive change with fear, anger, and depression.</td>
</tr>
<tr>
<td>Three: Coming to terms</td>
<td>The realization that an organization has made change happen results in satisfaction; a new status quo is achieved.</td>
<td>Individuals realize that change is going to happen and begin to choose whether or not they will participate in the change effort; this stage involves understanding, acceptance, and moving on.</td>
</tr>
</tbody>
</table>

*Source: Adapted from 10 Steps to Successful Change Management by George Vukotich (ASTD Press, 2011).*
Think about a time in your life when you went through significant change. Perhaps it was a personal experience. Or maybe it’s an organizational change that you are currently enduring. Whatever the instance, record the specific reactions you had during each of the stages of The Change Curve.

Stage One:

Stage Two:

Stage Three:

Stage Four:

Stage Five:

Stage Six:
Change Management: The Process

“They always say time changes things, but you actually have to change them yourself.” —Andy Warhol

How well an organization manages change depends a great deal on how well people within that organization understand the change process.

The Change Cycle

The German-American psychologist Kurt Lewin, known as the founder of social psychology and one of the first people to study group dynamics and organizational development, created one of the first models for understanding organizational change. This model, developed in the 1940s, is known as Unfreeze—Change—Refreeze.

Figure C: The Change Model

Kurt Lewin Change Model

Stage One: Unfreeze. You are preparing the organization to accept that change is necessary, which involves breaking down the existing status quo before you can build up a new way of doing things. This stage often involves strong emotions as people may try to resist the disintegration of their current reality. Although these emotions can be difficult to work through, they are necessary so people can come to an understanding—and eventual acceptance—of the need for change.

Stage Two: Change. People are beginning to resolve their uncertainty and seek new ways of doing things. This stage involves two distinct parts: First people intellectually accept the change. Then they show their support by participating in the change management process. Their behaviors begin to show evidence that they support the new direction.

Stage Three: Refreeze. Only when you see evidence of lasting change is this final stage in effect. Some signs of sustainable change include a new organization chart, revised job descriptions, and new staff on payroll. It is important to establish a new normal, although another change will inevitably come along. People must feel some sense of stability so they understand how things get done and are able to perform at full capacity.
Figure D: Action Steps to Take During Unfreeze—Change—Refreeze

<table>
<thead>
<tr>
<th>Stage One: Unfreeze</th>
<th>Stage Two: Change</th>
<th>Stage Three: Refreeze</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicate a compelling message explaining why the current condition of the organization cannot continue to exist.</td>
<td>Share simply and often how the change benefits stakeholders.</td>
<td>Incorporate the changes into everyday business and use them as often as possible.</td>
</tr>
<tr>
<td>Challenge the existing mission, vision, and values.</td>
<td>Allow plenty of time for people to come to terms with the change, own it, and adapt their behavior.</td>
<td>Communicate the new status quo so all stakeholders continue to understand and embrace it.</td>
</tr>
<tr>
<td>Create a controlled crisis, which helps to build the motivation to seek a new equilibrium.</td>
<td>Use a hands-on management approach to ensure employees are connected to the change management process.</td>
<td>Celebrate the success of the change by acknowledging that it was a difficult transition and thanking stakeholders for their participation in the process.</td>
</tr>
</tbody>
</table>

Using The Change Curve

During the process of Unfreeze—Change—Refreeze, you can leverage The Change Curve. Guide people through this natural process and help to minimize the negative impact of change on individuals and the organization.

Stage One: Denial. *This is a critical stage for communication.* People need to understand what is happening.
- Communicate often, but don’t overwhelm people with too much information at once.
- Ensure that people know where to go for more information if they need it, and always answer any questions that arise.

Stage Two: Anger. *This stage is the “danger zone.”* If badly managed, the organization may descend into crisis or chaos.
- Anticipate the impacts of change and the concerns people may have with it, and address these issues early with clear communication and support.
- Listen and watch carefully during this stage so you are prepared to respond to the unexpected.

Stage Three: Bargaining. *This stage should allow negotiations around new job expectations.* People are beginning to deal with their anger and fear.
- Welcome people’s concerns as they try to understand the change and how it will affect their daily jobs.
- Work with people to transition some of their current tasks to ensure they can better embrace new responsibilities.

Stage Four: Depression. *This stage is necessary for people to transition from reaction to acceptance.* People are coming to terms with their remaining hang-ups and letting go.
- Provide the space people need to make this transition.
- Continue to communicate the positive impacts of change.
Stage Five: Acceptance. *This is the turning point in the acceptance of change.* People will test change as they begin to accept it.

- Provide early opportunities for people to experience what the changes will bring.
- This stage takes time: Don’t expect top productivity yet, and encourage people to explore the changes without too much pressure to perform.

Stage Six: Moving On. *The positive effects of change become apparent.* It’s time to celebrate success with all who were involved in the process.

- Highlight your achievements to establish a track record of success.
- Reference your accomplishments when the next change comes…as it always does.
Change Management: The Role of Strategic Communication

“And that is how change happens. One gesture. One person. One moment at a time.” — Libba Bray

Now that you understand what change is and the process it entails, it’s time to think about how to strategically manage change in your organization through communication.

The purpose of communication in change management is to move individuals and the organization through The Change Cycle in such a way that individuals embrace change, and the organization experiences sustainable results. Stakeholder management is imperative in strategic communication: The organization must intentionally mitigate its relationships with various stakeholders—both internal and external.

Managing stakeholder communication

In the context of change management, a stakeholder is defined as anyone who has a vested interest in the change, such as managers who will lead change, employees who must help to implement change, and clients who will be impacted by changed products or services. The change management process affects each stakeholder group differently. By understanding stakeholders’ unique needs and targeting communication efforts to those needs, you will improve your change initiative’s chance of success.

Step One: Identify your stakeholders. Think of all of the people who are affected by the change, have influence or power over the change, and have an interest in the results of the change. These individuals and organizations include both internal and external stakeholders.

• Internal stakeholders are people who are committed to serving your organization.
  • Examples: Board members, employees, volunteers, donors
• External stakeholders are people who are impacted by your organization’s work.
  • Examples: clients, community partners

Step Two: Understand your stakeholders. Analyze how each stakeholder group is likely to feel about and react to change so you know how to communicate effectively with them. Some questions to guide stakeholder analysis include:

• What is their current opinion of your organization?
• What is their greatest source of motivation (such as money or service)?
• What financial or emotional interests do they have in the outcome of the change initiative?
• What information about the change initiative do they want from you?
• How do they want to receive that information from you?
• What is the best way of communicating your message to them?

The easiest way to answer these questions is to ask stakeholders directly. Most people like to talk about their views and welcome the opportunity to do so. Plus, stakeholders will appreciate that you’ve considered their perspectives during the change process.
Use the following chart as you begin to plan for and manage stakeholder communication.

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Internal or External?</th>
<th>What motivates them?</th>
<th>What main information do we need to communicate?</th>
<th>What communication channels are best?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: Donor</td>
<td>Internal</td>
<td>Recognition of donation and evidence of his money being put to good use</td>
<td>Explain how his money will be used throughout the change initiative</td>
<td>Public communication channels, such as a newsletter or website that recognizes him for his financial contributions</td>
</tr>
</tbody>
</table>
Step Three: Communicate with your stakeholders. Now that you’ve identified various stakeholders and their needs, it’s time to begin communicating with them. Using Brighter Strategies’s Model for Change Communication (see Figure E), the remainder of this workbook will guide you through the process of managing change with communication.

Figure E: Brighter Strategies’s Model for Change Communication

Planning
- Explain why the change will be implemented.
- Explain the purpose of the change.
- Describe the strategic objectives this change will help the organization meet.
- Create measurable objectives to determine whether or not the strategic objectives have been met.

People
- List the relevant individuals working on the project.
- List any other relevant individuals.
- List the roles and responsibilities of all those involved in the change management project from most influential to least influential.

Process
- Describe the project’s scope, any changes occurring to the scope, and how the change management plan applies.
- List all of the steps necessary.
- Describe the process by which the change will be managed.
- Explain how internal process changes will affect an organization’s external stakeholders.

Performance
- Describe any tools needed to implement the desired change.
- Document the new budget for implementing the project change.
- Perform a risk analysis for implementing any change in your project management plan.
- Create the change management schedule.

PLANNING

PEOPLE

PROCESS

PERFORMANCE
Change Management: Communication and Planning

“Be the change that you wish to see in the world.” —Mahatma Gandhi

Communication Checklist:
1. Explain why the change will be implemented.
2. Explain the purpose of the change.
3. Describe the strategic objectives the change will help to meet.
4. Create measurable objectives to determine whether or not the strategic objectives have been met.

The first step in strategically communicating change is to organize a change management team. For more information on how to form an effective project team, see Brighter Strategies’s workbook, Power Teams: Creating Effective Work Groups that Get Things Done. https://www.brighterstrategies.com/resources/#powerteams

Crafting a change vision

The most effective change communication is proactive, and begins before a change occurs. In your team, create a vision for the change. This vision should be communicated before, during, and after the change. Answer the following questions through your vision:
• Why is the change initiative being undertaken?
• What is at risk if the change is not made?
• How does the change vision differ from the organization’s vision?
• How does the change affect individuals now?
• What are the rewards of making change happen?
• What does a successful change look like?
• How do we measure whether or not the change was successful?

Frame the change vision in terms of the organization’s SPOT (strengths, problems, opportunities, and threats). Identify which part(s) of the SPOT the change affects, and how undergoing the change will move the organization toward its strategic goals. For more on the SPOT analysis, see Brighter Strategies’s workbook, Strategic Planning: A Step-by-Step Guide for Your Non-Profit Organization. https://www.brighterstrategies.com/resources/#strategicplanning
During one of your change team’s initial meetings, craft your change vision by answering the below questions as a group:

**Why is the change initiative being undertaken?**

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**What is at risk if the change is not made?**

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**How does the change vision differ from the organization’s vision?**

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**How does the change affect individuals now?**

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**What are the rewards of making change happen?**

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Creating change objectives

Part of planning for change includes setting measurable objectives at the beginning of the initiative. These goals will help to guide the change management process, identify what success looks like, and keep you focused on the end game.

The acronym S.M.A.R.T. is commonly known to describe well-written objectives. Such objectives are:

- Specific
- Measurable
- Attainable
- Realistic
- Time bound

Additionally, S.M.A.R.T. objectives:
- are precise and support only one interpretation
- describe an observable behavior
- specify conditions under which the behavior is performed
- identify criteria for accomplishment

Finally, effective objectives should cover the “three Ws and one H”:
- Who is involved?
- What are the desired outcomes?
- When will the outcome occur?
- How will progress be measured?
Using the guidelines on the previous page, draft the measurable objectives that will effectively guide the change management process and support your change vision, while aligning with your organization’s strategic objectives.

<table>
<thead>
<tr>
<th>Objective</th>
<th>How is it S.M.A.R.T.?</th>
<th>Does it cover the three Ws and one H?</th>
</tr>
</thead>
</table>
| **Example**: The first phase of office moving will be complete when Miller and Sons Moving Company transfers the office furniture of all 50 program employees to the new office location by no later than August 1, 2018. | **S**: Yes—it includes specific people, processes, and dates  
**M**: Yes—it is either fully completed or not completed by the specified date  
**A**: Yes—we have five months to complete this objective  
**R**: Yes—we have the necessary budget to pay the moving company and plenty of time to coordinate the move  
**T**: Yes—the deadline is August 1, 2018 | **Who**: program staff  
**What**: transferring office furniture  
**When**: By August 1, 2018  
**How**: Miller and Sons Moving Company |
| **Who**:  
**What**:  
**When**:  
**How**: |
| **Who**:  
**What**:  
**When**:  
**How**: |
Change Management: Communication and People

“Everyone thinks of changing the world, but no one thinks of changing himself.” —Leo Tolstoy

Communication Checklist:
1. List the relevant individuals working on the project.

2. List any other relevant individuals or organizations (refer to list of internal and external stakeholders).

3. List the roles and responsibilities of all those involved in the change management project, from most influential to least influential.

Change team members

As the Power Teams guide explains, one of the change management team’s first activities is to identify the roles and responsibilities of team members. Some important factors to keep in mind:

- Invite at least one representative from each stakeholder group to join the team. This will ensure that you take each audience’s unique cares and concerns into consideration as you craft your change messages.
- Designate a team leader, and describe the scope of his responsibilities.
- Describe the individual and group responsibilities of each of the additional team members.
- Identify change champions in the organization.

Whom will you invite to join your change management team? List your team members’ names, roles, and responsibilities below.

<table>
<thead>
<tr>
<th>Team member</th>
<th>Role</th>
<th>Responsibilities</th>
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Change champions

Change champions are individuals who act as advocates for the change. These people are:

- influencers
- natural leaders by behavior, not necessarily role
- active in the organization

Change champions are the first people in the organization to whom you will deliver your change message. Like the members of your change team, your champions should represent each of the stakeholder groups that will be affected by the change. Also, at least one senior leader should act as a change champion. The more senior-level support your change initiative has, the better.

Who are your change champions, and what contributions to the change initiative do you expect these individuals to offer? Describe below.

<table>
<thead>
<tr>
<th>Change Champion</th>
<th>Contributions</th>
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Listening for feedback

A vital component of change communication is listening to people. Listening involves monitoring the environment to see what challenges people are facing, proactively seeking input for ideas the organization should consider, and acting on feedback from earlier communications.

Consider these listening tips to make people feel valued, while gaining critical insight during the change process:

- Carefully listen for understanding, not just an opportunity to respond.
- Although agreement is not necessary, listen without judgment and acknowledge that you have heard what is being said.
• Provide all stakeholders affected by the change an opportunity to share their feedback, and offer a variety of communication channels such as formal face-to-face meetings, phone interviews, email, blogs, and online surveys.
• Most critically, respond to any feedback offered voluntarily; responding helps to build support for the change, while not responding can eliminate support.

How well are you listening? Below, check which communication channels you are using to solicit feedback, summarize some of the common themes emerging as you listen to stakeholders, and note whether or not you are receiving helpful feedback through each channel. (For more on communication channels see Figure F.)

<table>
<thead>
<tr>
<th>Communication channel</th>
<th>Used?</th>
<th>Major feedback</th>
<th>Helpful channel</th>
<th>Not helpful channel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Face-to-face</td>
<td></td>
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<tr>
<td>Phone</td>
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<td></td>
<td></td>
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<tr>
<td>Email</td>
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<tr>
<td>Survey</td>
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<tr>
<td>Social media (blog or wiki)</td>
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</table>
Change Management: Communication and Process

“Life is a series of natural and spontaneous changes. Don’t resist them; that only creates sorrow. Let reality be reality. Let things flow naturally forward in whatever way they like.” —Lao Tzu

Communication Checklist:

1. Describe the project’s scope, any changes occurring to the scope, and how the change management plan applies.

2. List all of the steps necessary.

3. Describe the process by which the change will be managed.

4. Explain how internal process changes will affect an organization’s external stakeholders.

A well-crafted change message is the fundamental building block of all successful change communication. This message should be:

• short, simple, and specific
• like a 30-second elevator speech
• easy to remember

A change message should take individuals through the following components of the change process:

• Current state: What is the challenge or problem we are facing? What is “pushing” us to change?
• Future state: What solution are we working toward? What is our vision for change?
• Methods: What is our action plan? How will we arrive at the future state?
• Result: What is our ultimate goal? What is our vision, realized?

For example...

Change: Organization ABC is moving program services from its current facility to another facility located several miles away.

• Current state: The changing client population has specialized needs that the current facility is unable to meet. Also, the current facility’s rent has increased significantly during the past three years, so it is no longer financially viable for ABC to remain there.
• Future state: By taking advantage of this new opportunity, ABC will be able to serve additional customers while also cutting expenses in the facilities budget.
• Method: ABC will move to the new location in three stages, during the course of a year. It will hire professional movers to take care of the labor-intensive work, and will update program managers weekly on the initiative’s progress and timeline.
• Result: The new lease will save ABC $20,000 annually, and the more accessible facility will allow each program to serve at least 10 additional clients with severe physical disabilities.
Now it’s your turn! Below, craft the change message you will share with your organization.

**Change:**

**Current state:**

**Future state:**

**Method:**

**Result:**

**Storytelling**

Stories are relatable and gripping because they engage people’s emotions. If stories resonate with your audiences, individuals will be more prone to share them, making your change communication contagious. Use the following guidelines to write a compelling story about your organization’s change initiative.

1. Define the story’s main objective.
   - Example: We plan to move our program services to a new facility by the end of the year.

2. Identify the protagonist and what that person wants. (The protagonist can be the organization.)
   - Example: There is a large population of prospective clients who want an opportunity to engage in meaningful work and earn a living.

3. Determine the conflicts the protagonist must overcome to get what he wants.
   - Example: Unfortunately, these clients cannot work here because our current facility does not cater to their unique physical needs.

4. Describe the climax of the story, or the “point of no return.”
   - Example: We have a decision to make: We can either remain in our current facility because it’s comfortable and moving is a pain, or we can put in the hard work to transfer our programs to the more accessible facility a few miles away.
5. Share the story’s resolution, or how everything turns out at the end.
   • Example: We are planning to put in the hard work and move to the new facility by the end of the year, which will create the space for at least 10 new individuals per program.

6. Call individuals to action now that you have creatively communicated the change message and have their attention.
   • Example: We need your help to complete this move as efficiently as possible. We cannot do it effectively without your support and assistance along the way.

It’s time to tell your story. How will you engage your audience’s emotions through storytelling? Using the above outline, draft your change story here.

________________________________________________________________________
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**Change Communication Basics**

1. **Tell the good news and the bad news.** Honest and candid communication is key to gaining instant credibility. People want to know the truth, even if it’s tough to hear. Tell the full story right off the bat.

2. **Focus on the magic combination.** Tweak your core change message for each audience (employees, clients, stakeholders, and so forth). Ask yourself, “What does this audience find compelling and concerning?” Cater your message to those unique considerations.

3. **Repeat, reiterate, and reinforce.** Studies show that your audience needs to hear your message seven to 10 times before they really get it. Don’t assume they’re paying attention the first few times. You can never over-communicate during a change initiative. The key to doing this well is to layer a message, which means deliver the same information through a variety of channels (see Figure F).

4. **Use third-party validation when possible.** Ensure that representatives from the change management team are not the only ones communicating throughout the process. Encourage change champions to add their own perspectives to the change message as they share it with those around them.

5. **Use human examples and real numbers.** Examples and numbers help the message to “stick.” Take your message cues from popular commercials that are easy to remember because they incorporate famous people or reinforce real numbers.

*Adapted from The Change Book: Change the Way You Think About Change by Tricia Emerson and Mary Stewart (ASTD, 2011).*
**Figure F: Communication Channels**

<table>
<thead>
<tr>
<th>Channel</th>
<th>Advantage</th>
<th>Disadvantage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Face-to-face</td>
<td>Two-way communication; can adjust and alter the message as needed based on the audience’s reaction</td>
<td>Takes time and costs more than other channels</td>
</tr>
<tr>
<td>Video</td>
<td>Reaches a large audience and provides engaging visuals</td>
<td>One-way communication, and some individuals may not have the necessary technology to receive the message</td>
</tr>
<tr>
<td>Social media</td>
<td>Two-way communication that allows audience to participate and engage in the communication through comments and discussion</td>
<td>May lose control, and the purpose of the original message may be altered as discussion takes individuals in a new direction</td>
</tr>
<tr>
<td></td>
<td>Allows an organization to create a sense of community with stakeholders</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Allows audience to carry and share the message to new and varied stakeholders</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>Quick, inexpensive, and can reach a large audience</td>
<td>Impersonal and leaves some interpretation of the message’s meaning open to the receiver</td>
</tr>
<tr>
<td>Phone</td>
<td>Can speak directly to an individual and address his concerns immediately</td>
<td>Costly and time-consuming</td>
</tr>
<tr>
<td>Newsletter</td>
<td>Establishes a connection with a mass audience fairly quickly</td>
<td>One-way communication that doesn’t allow for the development of tailored and targeted messaging</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Follow-up takes time</td>
</tr>
<tr>
<td>Letter</td>
<td>May provide a level of comfort and professionalism for those who grew up using this medium</td>
<td>Slow, expensive, and difficult to follow up</td>
</tr>
</tbody>
</table>

*Source: Adapted from 10 Steps to Successful Change Management by George Vukotich (ASTD Press, 2011).*
Change Management: Communication and Performance

“Change is the end result of all true learning.” —Leo Buscaglia

Communication Checklist:
1. Describe any tools needed to implement the desired change.
2. Document the new budget for implementing the project change.
3. Perform a risk analysis for implementing any change in your project management plan.
4. Create the change management schedule.

How do you know if your change initiative was a success? First, review the change objectives you identified in the Communication and Planning section of this workbook. Now, answer the questions below:

Did you meet your change objectives? If any were not successfully met, list them below.

What kept you from meeting these objectives? List barriers to success.

Now that you have examined each change objective, it’s important to evaluate the results of overall change to understand the impact of the change management process. For an in-depth look at evaluation, see Brighter Strategies’s workbook, Evaluating Performance Outcomes: A Guide to Implementing Program Evaluations. https://www.brighterstrategies.com/resources/#evaluatingperformanceoutcomes
Follow this four-step process to evaluate the effectiveness of your change management initiative on an ongoing basis.

1. **Calculate a baseline performance measure.** This figure represents the current costs dedicated to the existing program and includes staff, time, facilities, software, and so forth.

2. **Benchmark best practices in other companies.** Identify industry-leading competitor companies or sister agencies and educate yourself on their programs. You may be able to adapt their pre-existing creative approaches to your change initiative, which will save you time and costs incurred from reinventing the wheel.

3. **Determine new costs after you have implemented the change.** Compare new figures to both the baseline measure and the benchmarked costs. If your initiative did not produce projected cost savings, dig deeper to determine causes for the missed mark(s).

4. **Improve any areas of the change initiative that are not working as well as you expected.** Change management is a continuous quality improvement (CQI) process. As you work to improve the change implementation, continue to calculate costs on a monthly basis and track them against the baseline and benchmarked figures. Always be on the lookout for CQI opportunities.

*Using the above process, track the performance of your change initiative.*

<table>
<thead>
<tr>
<th>Costs analyzed</th>
<th>Baseline measure</th>
<th>Benchmark measure</th>
<th>New measure after change (month one)</th>
<th>New measure after change (month two)</th>
<th>New measure after change (month three)</th>
</tr>
</thead>
<tbody>
<tr>
<td>People resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Facilities expenses</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operational costs</td>
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<td></td>
<td></td>
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<tr>
<td>Time</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology</td>
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</tbody>
</table>

The key to strategic communication during this final step in change management is to share results with all identified stakeholders, just as you described your change vision and divulged the change process along the way. Take advantage of your communication channels as you focus on CQI.
Change Management: The Role of Change Competencies

“What if change isn’t the problem? We may not be able to control whether we experience change, but we can control our mindset and actions regarding change.” – Elad Levinson

Before we conclude this discussion on change management, let’s consider how we can approach change proactively. The role of strategic communication in the change process is often reactive, as a means to mitigate the organizational effects of unfolding change or prepare employees for impending change. But what about readying both your agency and your people for change before it’s even a blip on the radar?

That’s where competency development comes in.

A competency is an identified knowledge, skill, or attribute that directly and positively affects the success of employees and the organization. Change readiness is a behavior competency, or a core behavior applicable to all employees and tied to organizational culture.

Some hallmarks of change competency include:

- **Awareness**: an ability to scan the external environment and internal organization for change
- **Adaptability**: the degree to which an employee or organization is flexible and agile
- **Anticipation**: consistent optimism about the future with the understanding that change is inevitable
- **Attention**: clear focus on individual and organizational goals at hand regardless of impending change

To what extent are your employees change competent? Certainly each individual is different, but for the purpose of this exercise, choose a particular team within your nonprofit and rate its combined change-readiness capabilities, on a scale of 1 to 10, with 1 being “not at all change competent” and 10 being “extremely change competent.” Next to each rating, describe why you assigned that number.

Awareness:
Adaptability:
Anticipation:
Attention:

Now that you have a benchmark assessment of change readiness, you can take one of several courses of action to improve the strength of this competency in your organization.

1. Hire new, change-competent employees.
2. Develop change-ready behaviors in existing employees.
3. Both of the above.

Regardless of which of the above paths you choose to increase your organization’s change readiness, be sure to incorporate change competencies at a strategic level.

- Align goals to create a clear understanding of the link between change competencies and individual performance to
the overall outputs of the organization.

- Promote best practices though custom training activities that focus on personal and professional development and team learning to support change competencies across the organization.
- Encourage learning by providing a collaborative training experience using organization-specific content to foster team building, knowledge sharing, peer coaching, and mentoring.

Use the table below to begin tracking and developing the improvement of your employees’ change readiness. For each key element, describe in what ways the employee exceeds, meets, or is below expectations.

Employee Position: Frontline manager
Competency: Change Readiness

<table>
<thead>
<tr>
<th>Key Elements</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Below Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awareness: an ability to scan the external environment and internal organization for change</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Adaptability: the degree to which an employee or organization is flexible and agile</td>
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<td></td>
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<tr>
<td>Anticipation: consistent optimism about the future with the understanding that change is inevitable</td>
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<tr>
<td>Attention: clear focus on individual and organizational goals at hand regardless of impending change</td>
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</tr>
</tbody>
</table>
Concluding Thoughts: Time to Walk the Talk

You did it! You have learned how to effectively manage change in your organization. Congratulations!

Take some time now to briefly revisit Mr. PACE where he appears throughout this workbook, and review the activities you completed along the way.

What are the three most important concepts you learned from this workbook?

1.

2.

3.
What else is on your mind? Below, write additional next steps you will take to begin using what you have learned in your organization, starting today.