

Change Management: The Under Appreciated Factor

By Scott Hopkins and Sheila Sirois

Successful software implementations go hand-in-hand with well-planned change management programs. A change management program can make a difference on several levels of an organization – by minimizing productivity loss, getting user buy-in, successfully training users, and answering the important question, “What’s in it for me?”

What is change management? Change management is a structured approach to managing change that eases the transition from a current state to a desired future state. For a successful business change, whether process or technology, the involvement of the people affected is critical. Change management provides the mechanisms for managing the ‘people side’ of the change.

The following article tells the story of two organizations implementing the same property management software package. One organization had a successful change management (CM) approach, whereas the other did not. As you will see below, the organization with the CM program was much more prepared for the go-live date, and as a result their productivity dip was minimal and they were able to operate more closely to ‘business as usual’. The organization without the CM program had difficulty in transitioning and experienced a large dip in productivity once the software went live.

As you read through this article, notice some of the major themes running throughout. These themes represent the cornerstone of a successful CM program:

1. Stakeholder involvement
2. Testing
3. Organizational impact analysis
4. Workforce transition
5. Communications
6. Training
7. Post go-live support

Company A

Management’s main goal was to get the software implemented quickly and get the users trained quickly so that they could start using the software as soon as possible. Once the software was purchased, management worked directly with the software company to define the requirements and configure the software. The requirements were therefore designed from a high-level approach, which failed to take into account the day-to-day tasks of those who would eventually be using the software: the end-users. Since this important group was left out of the process, they were not involved in testing the software either, so there were no opportunities to iteratively improve the software’s design.

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As a result of this approach, there was no analysis as to how the new software would affect the end-users. Instead of conducting an Organizational Impact Analysis (OIA) – which compares the old software’s functionality to the new software’s functionality and outlines the major impacts the new software will likely have – management decided that the end-users would learn everything they needed to know about the software during training.

The problems with this approach became quickly apparent when training began, and continued long after the software went live. The trainers had no idea how the old software worked and therefore could not point out the major benefits of the new software over the old; nor could they map the users’ functions in the old program to the functions in the new program. (In other words, they couldn’t answer the all-important question, “What’s in it for me?”) This caused the students to not only get frustrated with the trainer, but it undermined their confidence in the new software as well. Once the software was live, many of the users decided not to use the software until forced by their superiors to do so.

Other problems arose because of management’s approach to the training program. Ideally management would have embedded a professional change management and training consultant into the program - a consultant who could have fully learned the organization’s business processes, incorporated them into a custom student guide, and imparted this knowledge to others as part of a train-the-trainer program. Instead, management went with the standard ‘vanilla’ training, which consisted of only vague high-level overviews of the software and instructions on how to push certain buttons and fill out certain fields. Throughout training the students realized the trainer knew very little about what they actually did, and they themselves had difficulty understanding how the software worked within the framework of their business.

Trainers themselves got frustrated because they heard many students say, “I’m only in this class because my boss told me to be here - I don’t even use the property management software now, so I don’t know why I’m going to be expected to use the new software.” It became clear to the trainers that many people didn’t seem to belong there. Management’s response to this was, “We want to make sure we have enough people trained in case we find out we need more people to use the software”. Had a full Organizational Impact Analysis (OIA) been done, management would have had a much clearer picture of whether or not they would need additional users.

The problems continued once the software went live. The users soon realized that they weren’t as prepared for the transition to the new software as they could have been. For example, they realized that as a result of the migration from the old software to the new they had several pieces of data to cleanup in the new system, that only people accustomed to managing property could clean up. (So all those extra people trained were of no use). Company A found themselves short of resources to help conduct this

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cleanup, so users began cutting corners as they managed their property within the system.

It didn't take long for management to realize that the users were incorrectly using their pristine new system. Management scrambled for ideas on how to improve their users' knowledge of the system, and they realized that the only people they could turn to were the trainers, who, despite their woeful ignorance of the business processes, seemed to be the only people who knew how to use the software properly.

While the users eventually got fully up-to-speed with the new software (after several months of use), in the end Company A squandered hundreds of thousands of dollars on software re-design, (to work better with their business processes), re-training the end-users, worker 'sick-outs', and lost productivity. Management got the software they wanted, but at what price?

As we have seen Company A had a rough go of things. Keeping the same themes in mind from above, let's see how Company B did.

Company B

Management early on made the decision to bring in a change management team that would help them prepare the users for the change to come. The goal of the CM team was six-fold:

1. Get full buy-in from the user community on the functionality and identify user requirements of the software;
2. Ensure open lines of communication between management, the software implementation team, the change management team, and the user community;
3. Conduct a full analysis of the impacts the new software would bring - and help the community understand and prepare for these impacts;
4. Embed a professional change management and training consultant into the program to fully learn the organization's business processes, and incorporate into custom student guides the business practices, organizational impact analysis results, and step-by-step instructions on the software functionality. The consultant would also be charged with imparting this knowledge to others as part of a comprehensive train-the-trainer program
5. Conduct role mapping, which would allow the CM team to target their communications and training to only those who needed it; and
6. Implement a post go-live support team to help users use the software in real-time.

Once the software was purchased management asked all levels of the organization to be involved in the design and implementation of the software, including end-users. Property management experts worked directly with the software company to configure

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the software, ensuring the organization's policies and business practices were incorporated. The end-users were regularly invited to view demos and test the software, and their feedback was integral in tweaking the software. Not only did the users get plenty of exposure to the software, but this also helped management get full buy-in from the end-users, thus helping to ensure that the users 'owned' the system once it went live.

The CM team was involved in the software implementation from day one. They worked to get a full understanding of the business processes: as they were with the old software and as they would be with the new software. They conducted an Organizational Impact Analysis (OIA) to analyze how the new software would most affect the end-users. The OIAs compared the old software's functionality and business processes to the new software's functionality and business processes, and outlined the major impacts the new software would likely have. Once this analysis was complete, the results were presented to members of the end-user community, so that they could understand the impacts and take steps to prepare for them before, during, and after go-live. This gave the CM team a chance to answer the question, "What's in it for me?" and allowed the end-users to get an idea of how their jobs would be changing - positively, negatively, or both.

Hand-in-hand with this was workforce transition effort. In order for the CM team to prepare the users for the major impacts using the OIAs, communicate important information, and train the end-users, they conducted a role mapping analysis. Role mapping allowed them to match the roles of the new software to the software's user groups. For example, since the new software managed capital property, the CM team knew that the finance group would need training specific to this functionality. Role mapping told them there were 12 people in the finance group, so this group was informed of the finance OIA results and was trained using a finance-specific student guide.

Another example was the property custodians. Role mapping told the CM team that this was by far the largest group of users, so they knew that this was the group that would be most affected by the new software (and that several training sessions would be needed to train this group). The CM team was able to target several communications to this group, so that they were constantly kept apprised of the impacts and changes the new software would bring.

Finally, role mapping served as a tool for planning the logistics of the training. Once role mapping was complete, Company B learned they had four different user groups to train, totaling over 350 people. This allowed them to plan for a precise number of trainings for each group, and the precise number of classrooms needed for the training effort. The total effect of role mapping was that no one was trained in something they didn't need (i.e. a property custodial was not trained on finance functionality).

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Also in contrast to Company A, Company B had a change management and training consultant embedded within the CM team throughout the entirety of the software implementation. Not only was the training consultant intimately involved with the OIA analysis, the role mapping, and the end-user community, the training consultant also created a specific student guide for each of the four user groups. Each student guide contained the company's business processes, OIA impacts, and step-by-step instructions. As the training grew near, this training consultant was able to impart his knowledge onto other trainers during an extensive train-the-trainer program. This program consisted of daily teach-backs, where each trainer would teach a chapter and receive feedback from the other trainers. By the end of this program, the trainers felt fully prepared to answer any process or functionality questions that came their way.

As a result of the above efforts, (community involvement, OIA analysis, constant communications, a well-vetted software program, role mapping, and a strong cadre of trainers who were familiar with the business and the software), the training and property program implementation was extremely successful. The students knew why they were there, were pleased with the new software, were not taken by surprise by anything the software had to offer, and fully understood how it worked with their day-to-day business. Many of the trainers reported the students as saying, "This new software is way better than what we use now." Also, no one asked why they were in the training – a combination of the OIA results and the role mapping ensured that only those who needed training got training.

Once the system went live, the CM team put into place their program for post go-live support. This consisted of trainers venturing out into the user community to work with the users in a live setting. From these trips, the trainers got a good sense of what challenges people were having and how they could best address them. Also, the CM team worked closely with the help desk to determine which tasks people were having the most trouble with so that they could target communications or additional trainings to the necessary user groups.

In the end, Company B experienced a slight dip in productivity, (as is natural with ALL new software implementations). Management was pleased, however, as their earnings reports took only a few weeks, (not months), to come back up to their pre go-live levels. While management put a lot of money into the CM team, the fact that the financial hit to their earnings statements was minimal proved that it was a worthwhile investment.

As this article has hopefully showed, change management offers an approach to minimize the impacts of change on an organization. When utilizing all or many of the components of change management, organizations can better manage and measure the results of change.

Change Management Themes	Company A	Company B
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Recognized need for new software	X	X
Stakeholder Involvement		X
Testing		X
Organizational Impact Assessments		X
Workforce Transitions		X
Communications		X
Training	X	X
Post Go-Live Support		X

Table 1: CM Opportunities Realized

In *Table 1: CM Opportunities Realized*, it becomes obvious why Company B had a more effective property management software implementation than Company A. They were able to incorporate all the themes of change management throughout their property management software implementation. The end-users were involved in the process from the beginning and received communication and training in a timely manner to allow for a successful implementation. The follow-on support also helped to minimize down time. As such, by valuing the change management approach to their property software implementation, Company B was able to incorporate a positive change within their organization.

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