

Define Change Impact to Accelerate Adoption

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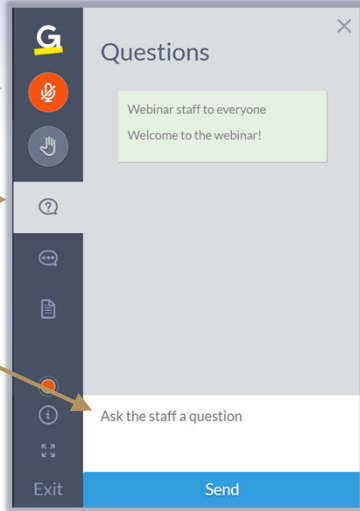
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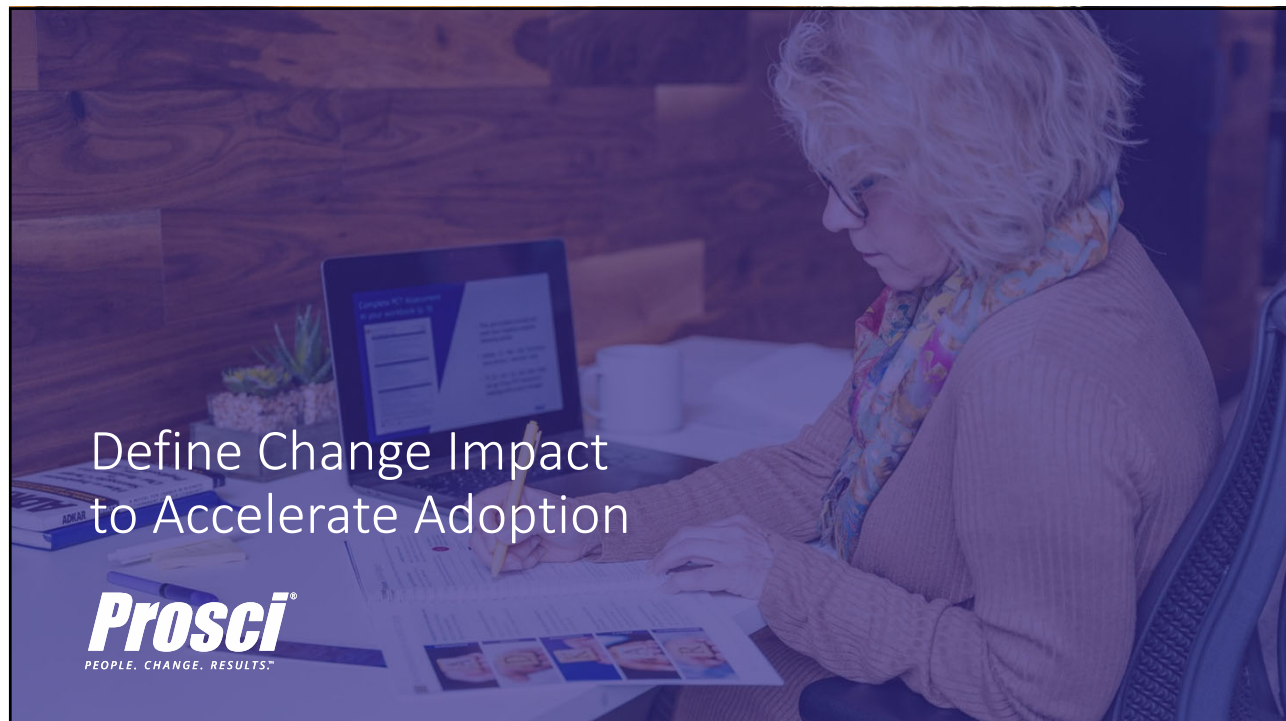
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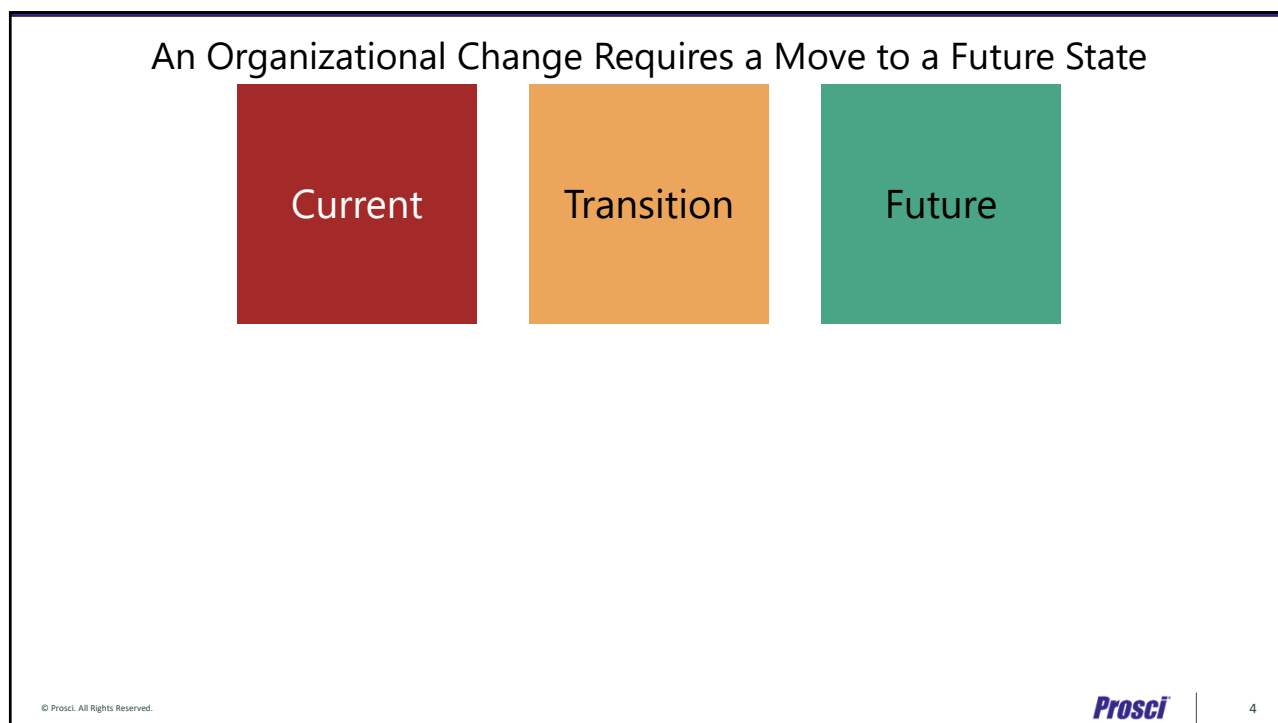
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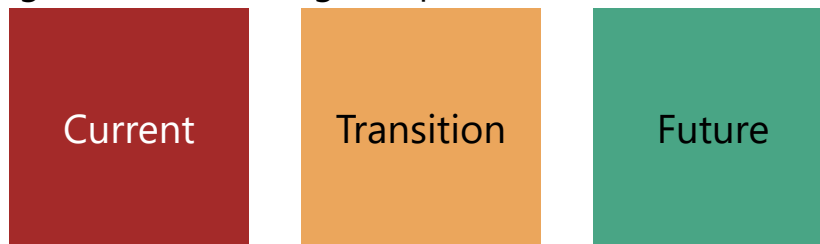


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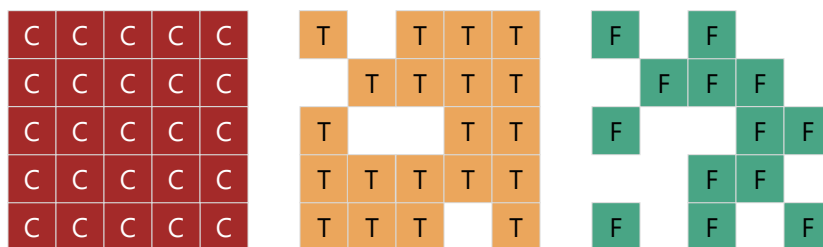
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An Organizational Change Requires a Move to a Future State



Ultimately requires individuals to move from their current to their future state



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Bring Change Into Focus



We're implementing a new CRM system.

Which will have a "high" impact on your job.



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Bring Change Into Focus by Defining Change Impact



The more clearly, we can define the change,
the better we can help people through it.

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ADKAR Model on a Page

ADKAR element	Definition	What you hear	Triggers for building
A Awareness	Of the need for change	"I understand why..."	Why? Why now? What if we don't?
D Desire	To participate and support the change	"I have decided to..."	WIIFM Personal motivators Organizational motivators
K Knowledge	On how to change	"I know how to..."	Within context (after A&D) Need to know <i>during</i> Need to know <i>after</i>
A Ability	To implement required skills and behaviors	"I am able to..."	Size of the K-A gaps Barriers/capacity Practice/coaching
R Reinforcement	To sustain the change	"I will continue to..."	Mechanisms Measurements Sustainment

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ADKAR Model on a Page

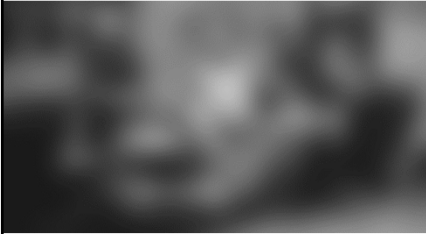


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We're implementing a new CRM system.

Which will have a "high" impact on your job.

You will learn new processes and CRM system modules & tools as well as have accountability for customer retention metrics in your compensation plan.

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How focused are your ADKAR tactics for the change impacts? Drop a pin.



Very Unfocused Very Focused

Start the presentation to see live content. For screen share software, share the entire screen. Get help at pollev.com/app

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The 10 Aspects of Change Impact Model describe the way a person or group may be impacted by change.



Agenda

- 1 Connect Change Impact & Adoption
- 2 Identify Aspects of Change Impact
- 3 Assess Change Impact
- 4 Define Impacted Groups
- 5 Engage People to Assess Impact

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10 Aspects of Change Impact



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10 Aspects of Change Impact – CRM Example



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Mindset and Critical Behaviors are Connected

- A mindset cannot be directly observed.
- Behaviors can be directly observed and measured.



Translating mindset to behavior aids adoption



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Deepen your understanding of change impact with the Change Impact Canvas

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Go Deeper to Define Impact



Yesterday-Tomorrow

Degree of Impact

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Change Impact Canvas



Change Impact Canvas Yesterday-Tomorrow			
Adaptation Challenge	Group		
Yesterday (before the change)	Aspect	Tomorrow (after the change)	Degree of Impact (0-5)
	Processes		
	Systems		
	Tools		
	Job Roles		
	Critical Behaviors		
	Mindset/Attitudes/Beliefs		
	Reporting Structure		
	Performance Reviews		
	Compensation		
	Location		

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10 Aspects of Change Impact

Describes the way a person or group may be impacted by change. Can be used to define what is changing for a person or group and assess the degree of impact.

Processes

The actions or steps taken to achieve a defined end or outcome.

Example: steps in the client engagement process and actions taken to capture data in a cloud-based CRM system.

Systems

A combination of people and automated applications organized to meet a set of objectives.

Example: the introduction of a new cloud-based CRM solution to manage and analyze client interactions and data throughout the customer lifecycle.

Tools

An item or implement used for a specific purpose; can be a physical object such as a mechanical tool or a technical object such as a web authoring tool or software program.

Example: a conversion tool to move data from one CRM solution to another one mapping data as needed.

Job Roles

A description of what a person does including competencies essential to performing well in that job capacity.

Example: the client services role responsible for engaging directly with clients.

Critical Behaviors

What or essential response of an individual or group to an action, environment, person or stimulus.

Example: the actions of a client services associate based on client needs expressed including engagement with other team members to collaborate on solutions.

Mindset/Attitudes/Beliefs

A mental inclination, disposition or frame of mind reflected in behaviors.

Example: the transition from a transactional mode of financial services engagement to one built on relationships with the mission of improving client retention and advocacy.

Reporting Structure

The authority relationships in a company or organization; who reports to whom.

Example: the move from regional sales teams to a global client services team with a different executive leader.

Performance Reviews

The process and indicators of how performance is measured and assessed relative to objectives.

Example: the introduction of specific client retention and advocacy objectives for client services associates.

Compensation

The amount of the monetary and non-monetary pay provided in return for work performed.

Example: the commission structure and bonus plan for client services associates.

Location

A physical geographical place that provides facilities for a stated purpose.

Example: the consolidation of all client services associates to one floor of the building instead of three separate locations by region.

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Think of an impacted group you want to assess.

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Change Impact Canvas

Yesterday (before the change)	Aspect	Tomorrow (after the change)	Impact (0-5)
	 Processes		
	 Systems		
	 Tools		
	 Job Roles		
	 Critical Behaviors		
	 Mindset/Attitudes/Beliefs		
	 Reporting Structure		
	 Performance Reviews		
	 Compensation		
	 Location		

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Change Impact Canvas – CRM Client Service Associates Example

Yesterday (before the change)	Aspect	Tomorrow (after the change)	Degree (0-5)
Client engagement processes differ by region	 Processes	Standardized client engagement process	4
No common system	 Systems	Introduction of a cloud-based CRM to improve customer lifecycle management	5
No shared tools	 Tools	Use of shared engagement tracking tools	3
Sales and growth of revenue	 Job Roles	Sales and growth of revenue + client retention and advocacy	3
Business information exchange	 Critical Behaviors	Listen, understand, and respond to build client loyalty	5
Transactional mindset; cost control is aim	 Mindset/Attitudes/Beliefs	Relational mindset; client retention is aim	3
Regional sales team, local leaders	 Reporting Structure	Global client services team with new executive leader	2
Evaluated on cost per call	 Performance Reviews	Evaluated on client retention	4
Salary	 Compensation	Salary and bonus program	3
Regional offices	 Location	No change	0

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Salary	Compensation	Salary and bonus program	3
Regional offices	Location	No change	0

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Tomorrow Defines Ability for the Impacted Group

Change Impact Canvas
Yesterday-Tomorrow

Adoption Challenge Group

Yesterday (before the change)	Aspect	Tomorrow (after the change)	Degree of impact (0-5)
	Processes		
	Systems		
	Tools		
	Job Roles		
	Critical Behaviors		
	Mindset/Attitudes/Beliefs		
	Reporting Structure		
	Performance Reviews		
	Compensation		
	Location		

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Change Requires Action in the Right Direction

"I am able to..."

Ability

The demonstrated capability to implement **the change**

Achievement of **the desired change** in performance or behavior

You can accelerate adoption by enabling individual ability in the future state

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It May Take Time to Define Impact Clearly

Early, at project initiation



High level information for the overall project

When solution design is in progress



General definition by groups

When solution design is nearing completion

Specific definition by group

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Not all groups are impacted by a change in the same way. Define groups that have people who are impacted in similar ways.



Agenda

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Connect Change Impact & Adoption

2

Identify Aspects of Change Impact

3

Assess Change Impact

4

Define Impacted Groups

5

Engage People to Assess Impact

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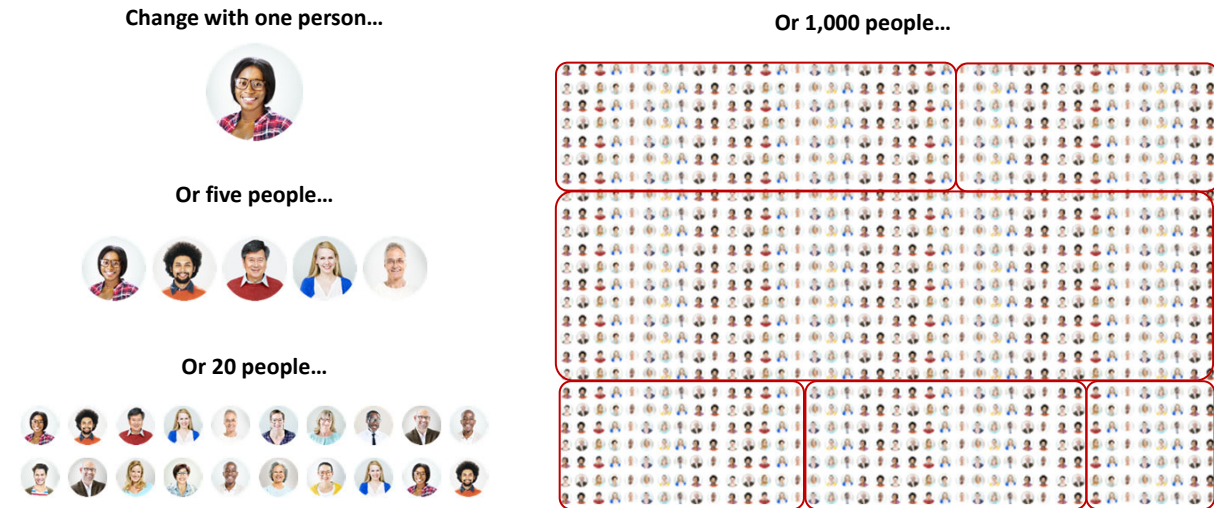
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Change Can Impact Groups Differently

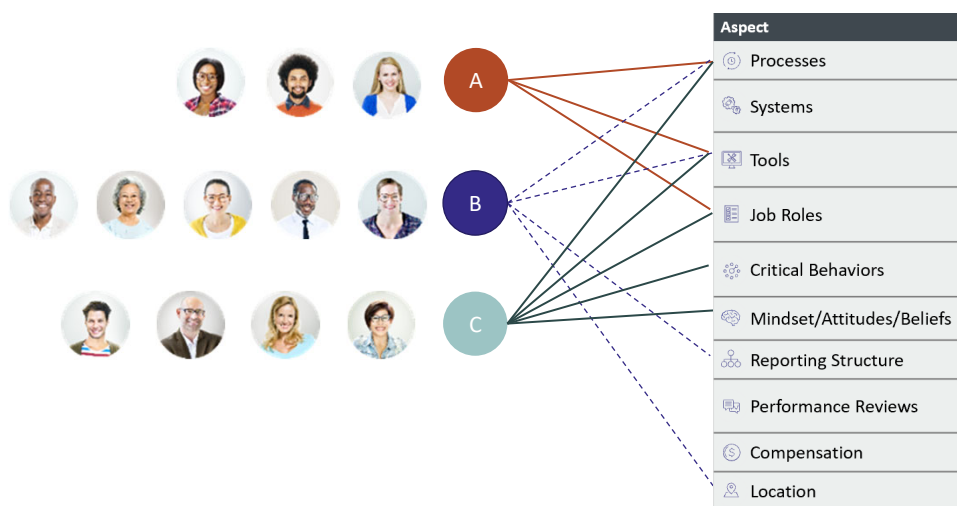


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Define Impacted Groups to Determine Unique Change Needs



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Degree of Impact Helps you Know Where to Focus

Change with one person...



Or five people...



Or 20 people...



Or 1,000 people...



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Engaging directly with the impacted people and groups can be very helpful in gaining deeper insight into impact.

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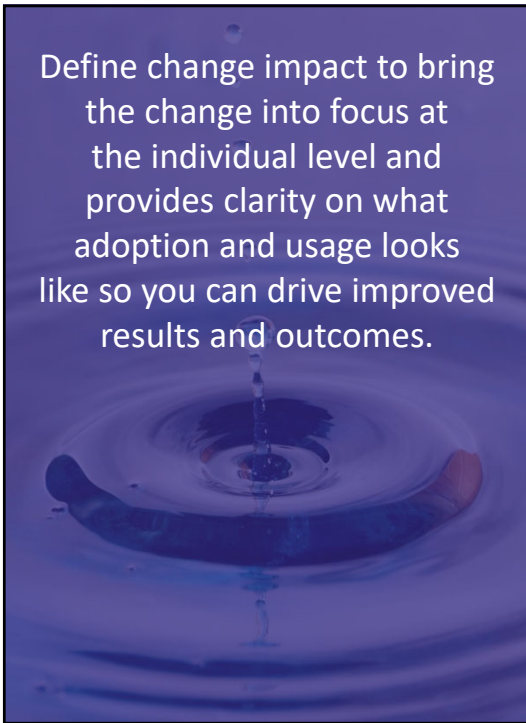


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Define change impact to bring the change into focus at the individual level and provides clarity on what adoption and usage looks like so you can drive improved results and outcomes.



Apply the 10 Aspects of Change Impact Model

- Inform specific actions to build ADKAR
- Define 'adoption and usage' for a group
- Uncover blind spots
- Identify where to focus your attention
- Engage people in the change process
- Increase understanding and foster empathy

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Heard Around Your Conference Table...



We are implementing a new change.

Yes, here is how people will be impacted by the change....

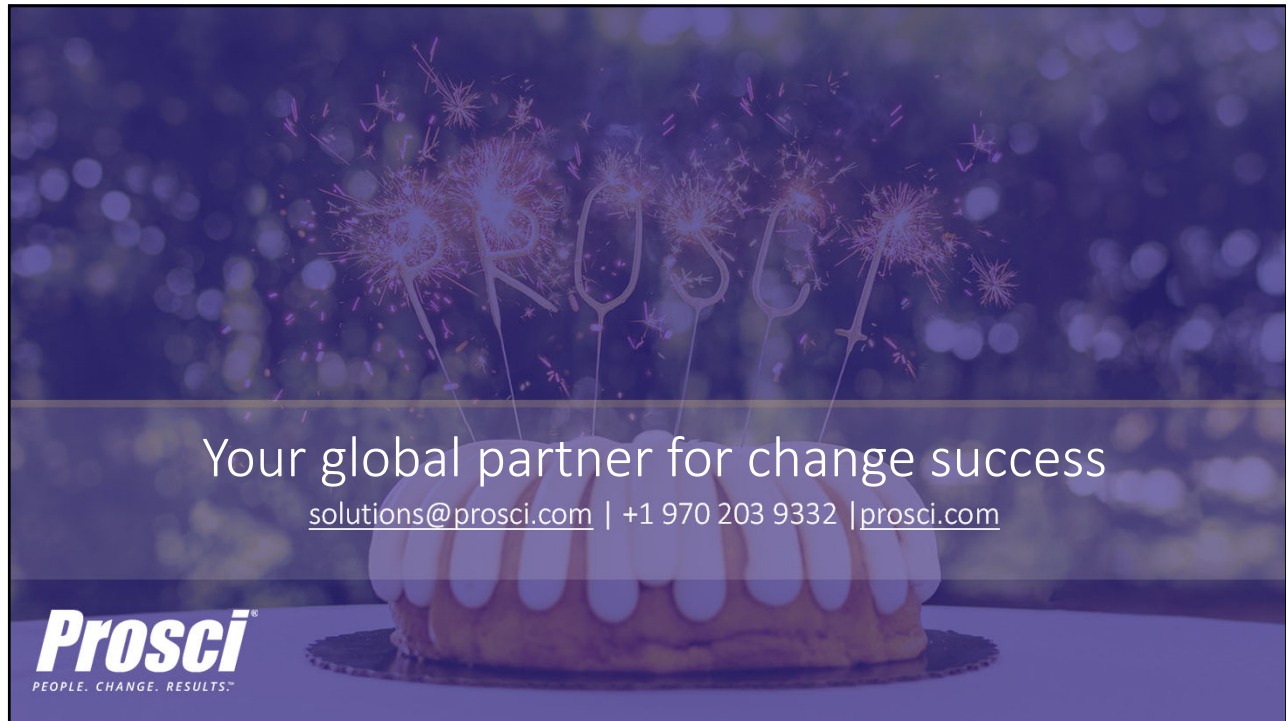
Great, we will get started on preparing, equipping and supporting people.

Accelerate Adoption

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