

## TEN FACTORS FOR ASSESSING EFFECTIVE CHANGE MANAGEMENT METHODOLOGIES

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In my 20 years of organizational consulting, I have led many change management initiatives across the gamut of strategic business initiatives (e.g., M&As, ERP implementations, organizational restructurings, large scale business transformations, spin offs, etc.) at some of the world's leading organizations. I have developed and implemented Change Management methodologies and tool kits for internal clients as well as global consulting firms. Additionally, I have conducted a number of "Change Management 101" training sessions for both internal as well as external consultants.



From this experience-base, I have had the benefit of exposure to the myriad change management methodologies, tool kits, competency models, "check the box" certification programs, and points of view that exist in the marketplace. I have always taken the position that you should not try to differentiate on your methodology but you can differentiate by ensuring your clients (either internal or external) that you have "been where they are going" and that you bring a lessons learned/best practices perspective to leading change.

From my perspective, change management methodology and tools are table stakes any more. If you don't have them, don't bother. That having been said, there are some common characteristics of what I would call "effective" or "leading" change management methodologies that can be used as guidelines for evaluating those available in the marketplace or if you are building your own approach and methodology internally. I have pulled together a list below of ten factors (in no particular order) to consider when evaluating which change management methodology or approach to adopt at your organization. They are as follows:

**1) Enterprise-wide Application** – Best practice Change Management methodologies can be applied across a spectrum of business interventions/activities (including business transformation, systems implementation, restructurings, M&A, etc.). Leading companies adopt and implement a consistent approach/methodology to managing change that can be used on all company change initiatives and is built into the company's DNA on how they drive change. Change management resources are able to "plug and play"

across multiple initiatives - with a common denominator being a consistent methodology and tool set. To that end, many organizations are requiring a Change Management competency of their internal consultants and leaders across the company.

**2) Change Readiness** – Best practice Change Management methodologies incorporate activities/tools to assess the organization's readiness for change prior to implementing the change. Conducting Change Readiness Assessments is a critical first step in determining where barriers to change may be inherent in the organization and serve as a key input into Change Management planning. If the organization is not ready for change, there are many proactive steps that can be taken to increase organizational readiness. There are a number of effective Change Readiness Assessment tools readily available in the market.

**3) User Friendliness** – Best practice Change Management methodologies are easily understood and applied by those responsible for administering and delivering change management tools and activities as well as by those who are expected to take action on the results (i.e., Project Sponsors, Change Agents, Leadership, etc.). Also, typically involves some form of Change Management training/kickoff session and knowledge transfer component to the project team. Keep in mind that the more complex the Change Management methodology, the less likely it will be used. Many methodologies have slapped on a number of bells and whistles that make for good optics, but not for driving effective change. Also note, you will not impress anyone with Change Management "consultant speak". The term "Change Management" is an esoteric one to many stakeholders and their eyes gloss over when they hear the term. Back in the early days, the term was interpreted literally . . . that we "are going to change management" - i.e., get rid of them! As you can imagine, many leaders didn't warm up to the concept. I tend to use the term "managing people risk" rather than "change management" - clients seem to grasp on to the concept of "risk" much more readily.

**4) Ease of Integration** -- Best practice Change Management methodologies are easily integrated into the overall project plan. Change management activities should be "baked in" and aligned to the project plan activities and not treated as a separate/standalone stream of work. Change management activities and deliverables should map well to overall project milestones. The best project plans I've seen are those where one has to look very closely to identify the change management activities, as they are deeply integrated.

**5) Comprehensiveness** – Best practice Change Management methodologies cover the complete lifecycle and the risk factors involved in both organizational and individual change – including Change Readiness, Employee Engagement, Communication Planning, Business Case and Link to Business Strategy, Vision for Change, Culture, Capacity for Change, Change History, Leadership Alignment, Stakeholder Commitment, Training, Risk Mitigation, Sponsorship, Behavior Reinforcement, and Managing Personal Change. Many methodologies merely focus on Communication and Training. And many are top down-driven and don't address the

personal side of change experienced at the individual level. Effective methodologies cover both the organizational and individual aspects of change, the latter being the most overlooked.



**6) Metrics Driven** – Best practice Change Management methodologies define quantifiable and measurable performance success metrics/scorecards at the beginning of the project/change effort and measure against those throughout the lifecycle of the project and beyond. Key metrics include productivity measures, speed of adoption, employee retention, employee engagement scores, project milestone completion, etc. To paraphrase the old adage, “if you can’t measure it, you can’t change it”.

**7) Project Team** – Best practice Change Management methodologies take into consideration not only those who are being impacted by the change, but also those responsible for designing and delivering it. This is a group that is often overlooked. Project team morale, team retention, burnout, etc. should be regularly evaluated as part of any change management approach. This is considered the “change management of the project management”. In addition, all project team members should be grounded in the Change Management methodology, as they will often serve a role of “ambassadors of change” or “change agents”.

**8) Communication Impact** – Best practice Change Management methodologies focus not only on communication planning/delivery, but also ensure that the messaging is being encoded as originally intended. Many approaches just focus on “getting the message out” and assume that the recipients of the message understand it. “We sent them a newsletter, of course they should understand”. Mechanisms for two-way communication, feedback, and measuring employee understanding of the change should be built into any effective Change Management approach. An effective Change Management plan will incorporate a communication plan based on a detailed Stakeholder Analysis. Not all stakeholders will need to be communicated to via the same channels and mechanisms.

**9) Change Tracking** – Best practice Change Management methodologies incorporate methods for monitoring change risk mitigation activities, identifying new change risks, assigning accountabilities for risk mitigation activities, and closing out people risks throughout the entire project lifecycle and beyond. Change risk mitigation updates

should be a standing agenda item for project teams. There are a number of different change tracking templates available in the market or can be created internally with relative ease.

**10) Sustainability** – Best practice Change Management methodologies do not end at implementation. Effective change requires sustainability well beyond “go live”. Change Management plan activities must be in place to identify opportunities for continuous improvement, conducting feedback sessions, monitoring employee engagement and adoption and continued reinforcement of “change-aligned” behaviors. Organizations that are effective at implementing change repeatedly build what is referred to as “change muscle” as they get stronger with each change.

These are ten factors based on my experience with various change management methodologies and by no means is intended to be an exhaustive list. That having been said, what other factors do you consider to be important components of an effective change management methodology?

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