



# ***Turbulent Times: HR's Role in Managing Change***

***Presented by:***

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***Jeitosa Group International***

January 13, 2010

***IHRIM Webinar: Turbulent Times  
Opening Doors Around the World...***


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# Polling Question #1

 How many people are attending the Webinar at your location?

1. 1
2. 2-5
3. 6-9
4. 10+

# Today's Presenters



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# Agenda

- About Jeitosa
- Understanding Change
- Viewing Change
- Identifying Stakeholders
- Managing Change
- Using a Model
- Coordinating Change – HR's Role
- Conclusion

# Key Characteristics

• **Our Name:** *Jeitosa* [zhay-taw-za] (Brazilian Portuguese) adj.  
agile, skillful, adroit, innovative, solution-oriented

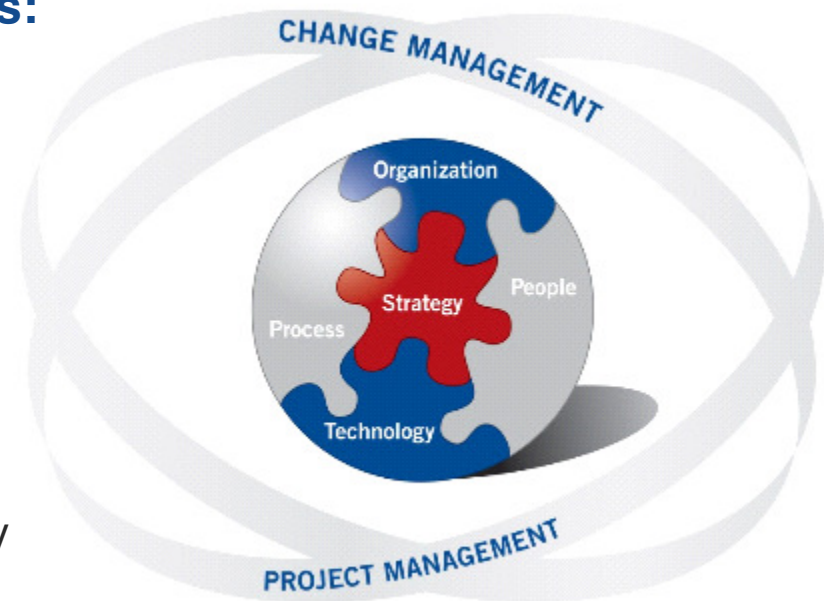
• **Our Mission:** Bridging people, process, and technology through agile, modern solutions to make global business possible.

• **Four main cornerstones of our business:**

- Business Strategy
- Communities of Interest
- Systems Deployment
- Solution Development

• **Four key competencies of our people:**

- Local Expertise – Global Approach
- Business Agility – Tailored Engagements
- Modern Solutions – Leveraged Technology
- Knowledge Sharing – Global Mentors



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# Some Thoughts on Change

***“There is nothing more difficult to carry out nor more doubtful of success nor more dangerous to handle than to initiate a new order of things.”***

***-Niccolo Machiavelli***

***“It is not the strongest of the species that survives, nor the most intelligent, but the one most responsive to change.”***

***-Charles Darwin***

***“We must be the change we wish to see in the world.”***

***-Mahatma Gandhi***



## Polling Question #2

 What changes are you experiencing?

1. Reorganization/Merger/Acquisition
2. Reduced Resources/Downsizing/Layoff
3. New Leadership/Systems/Processes
4. Other
5. All of the above

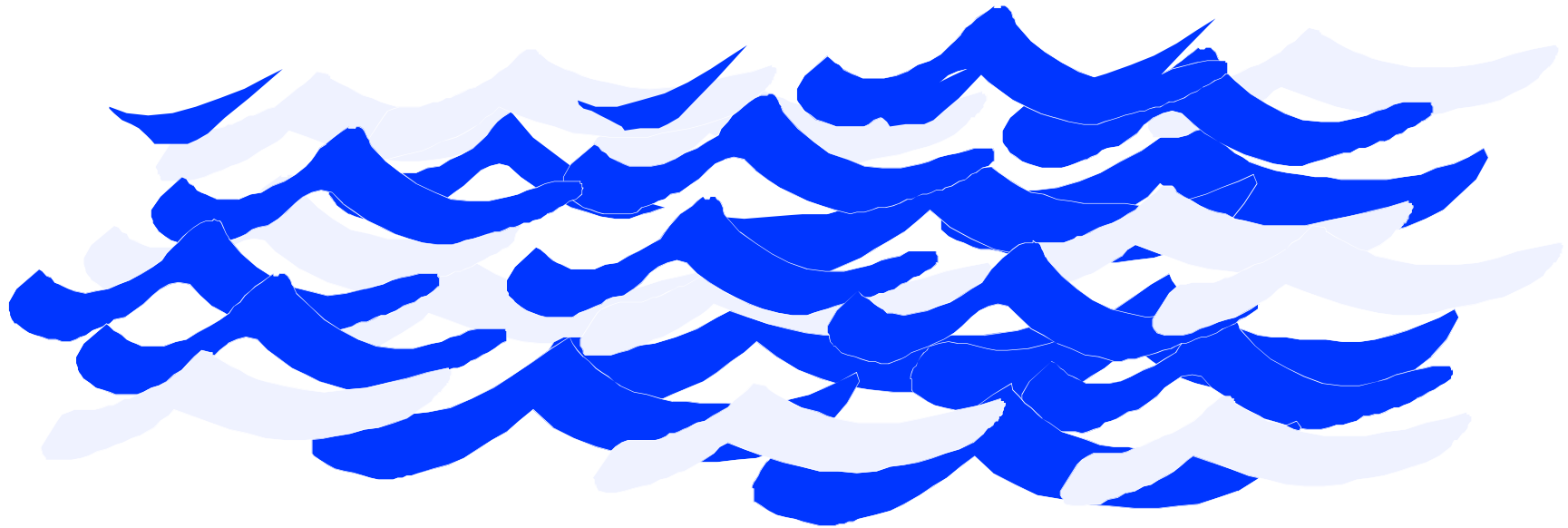
- The process of becoming different.
- Social change – any event or action that affects a group of individuals that have shared values or characteristics.
- Can encompass concepts as broad as revolution and paradigm shift to as narrow as a particular cause within small town government.

# Some Background

- Every organization is continually experiencing significant amounts and multiple different types of change:
  - leadership changes
  - organizational restructuring
  - mergers / acquisitions /divestitures
  - outsourcing and offshoring
  - new technologies and tools
  - new competitors and markets
  - ...
- Failure to effectively plan, communicate, train and implement change strategies can squander the benefits of change and adversely effect employee morale, engagement, and retention.

*Understanding Change*

# Permanent White Water



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# More Thoughts on Change

***“The first problem for all of us... is not to learn,  
but to unlearn.”***

***-Gloria Steinem***

***“If you have always done it that way, it is probably wrong.”***

***-Charles Kettering***

***“If you want to make enemies, try to change something.”***

***-Woodrow Wilson***

## Polling Question #3

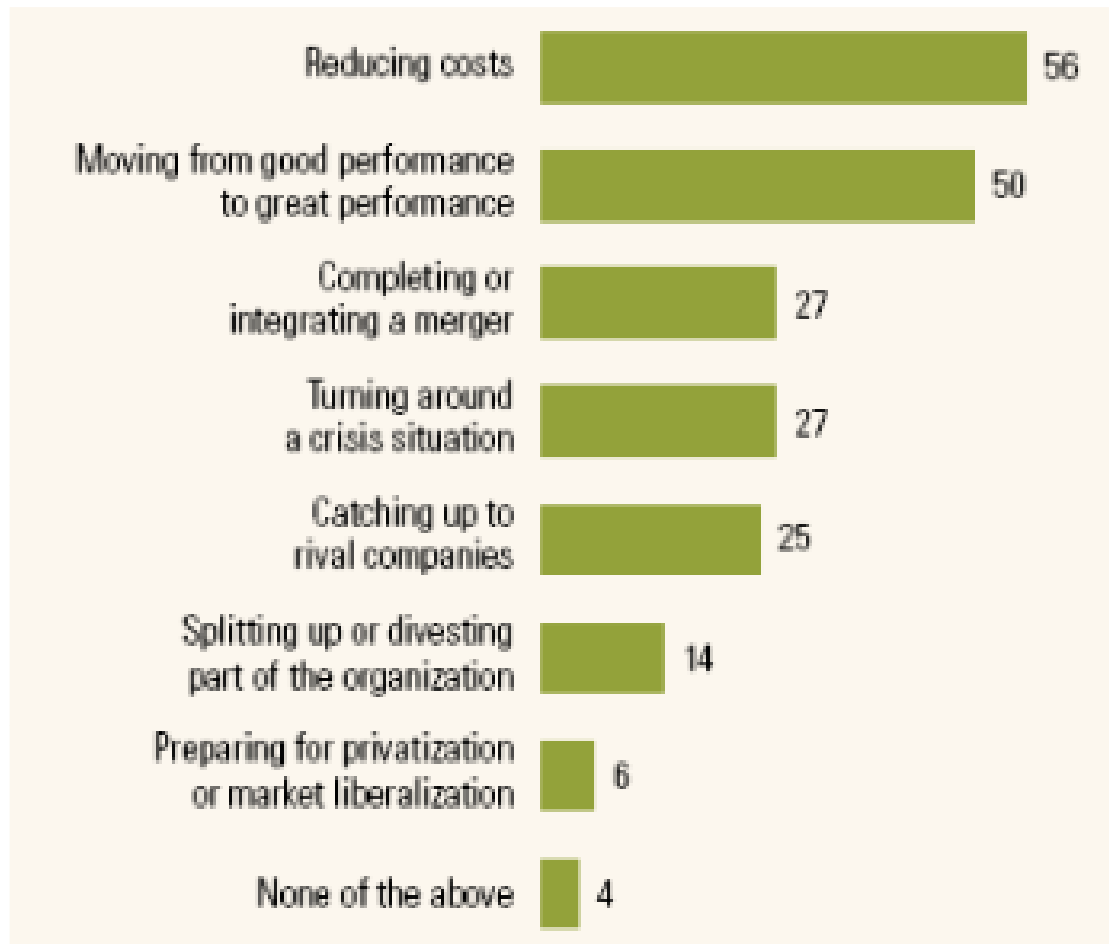
 Does your organization view change as?

1. Inevitable
2. Unforeseeable
3. Ongoing
4. A Normal Part of Business
5. Unfortunate

# Executive Reasons for Change

Source: McKinsey, 2006

***Main goals are reducing costs and improving performance***

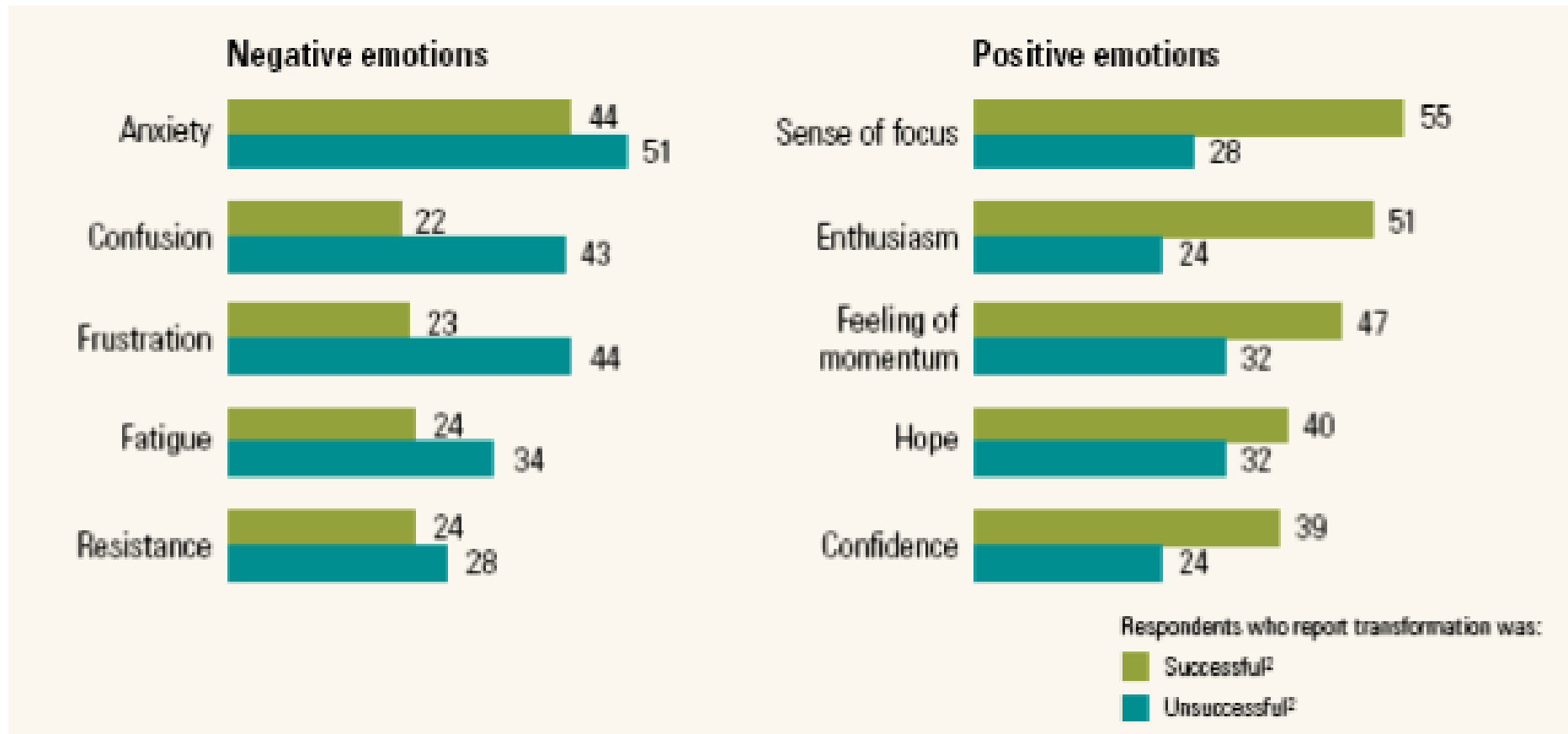




# The Many Moods of Change

Source: McKinsey, 2006

***Roughly evenly split between positive and negative emotions***



## Viewing Change

# Differing Views by Generation

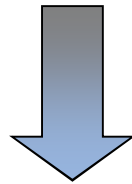
Source: Jeitosa, 2008

	Veterans	Boomers	X'ers	New Mils
Born	1920-1940	1940-1960	1960-1980	1980-2000
General Outlook	Practical	Optimistic	Skeptical	Hopeful
Work Ethic	Dedicated	Driven	Balanced	Self-fulfillment
View of Authority	Respectful	Rebellious	Unimpressed	Polite
Leadership By	Hierarchy	Consensus	Competence	Collaborative
Relationships	Sacrifice	Gratification	Reluctance	Inclusive
Compensation	My Job	My Achievements	My Skills	My Work
Communication	Memorandum	Email	SMS	MySpace
Technology	Mainframe	Personal Computer	Client / Server	Web Services
Skills & Competencies	Transportation & Telecommunications	Information / Data	Technology	Integration of Information & Technology
View of change	Get it over with	Create it	Make it work for you	Inevitable & increasing
Employer Relationship	Company Loyalty	Career Loyalty	Selective Loyalty	Balanced Loyalty
Employee Desires	Fair wage Stable employment Secure retirement	Competitive wage Meaningful work Comfortable retirement	Wealth Work-life balance Early retirement	Wealth accumulation Indulge interests Work in retirement

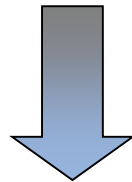
# Kurt Lewin's Change Process

Source: Kurt Lewin, 1935

Un-Freezing



Transition



Re-Freezing

## ***Becoming Motivated to Change***

- ***Dissatisfaction***
- ***Survival Anxiety***
- ***Learning Anxiety***

## ***Changing What Needs to Change***

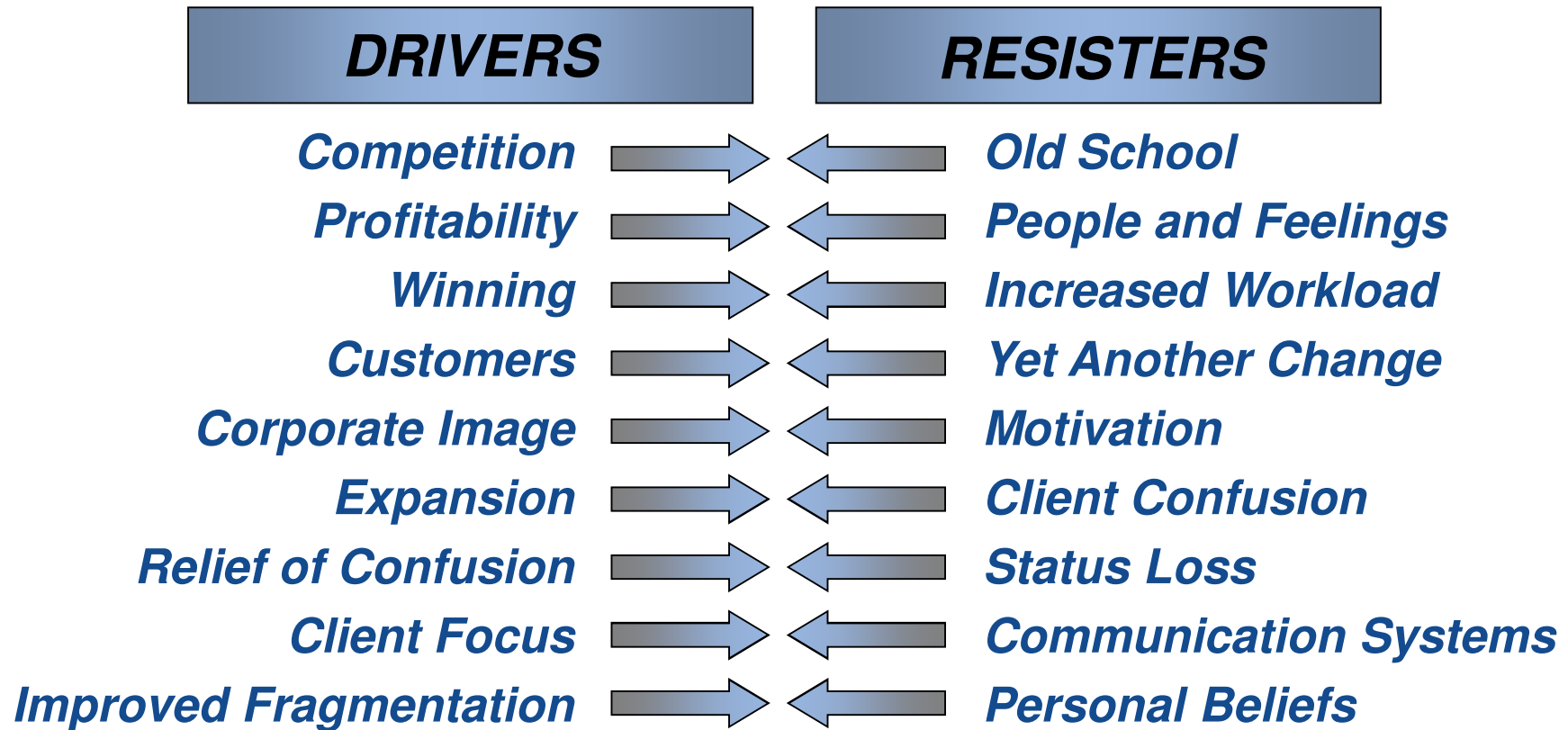
- ***Confusion and Transition***
- ***Old ways are Challenged***
- ***No Clear Picture***

## ***Restoring New Mindset and Comfort Level***

- ***New Self-Concept & Identity***
- ***New Interpersonal Relationships***
- ***New Level of Productivity***

# Lewin's Force Field Analysis

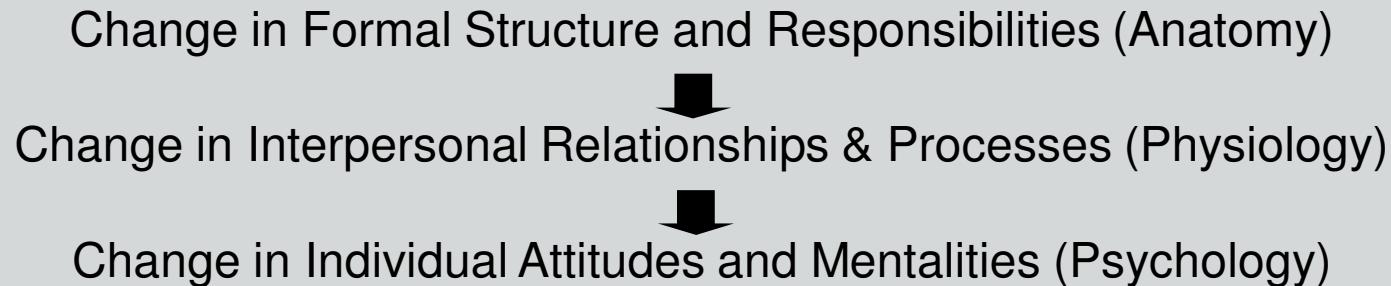
Source: Kurt Lewin, 1935



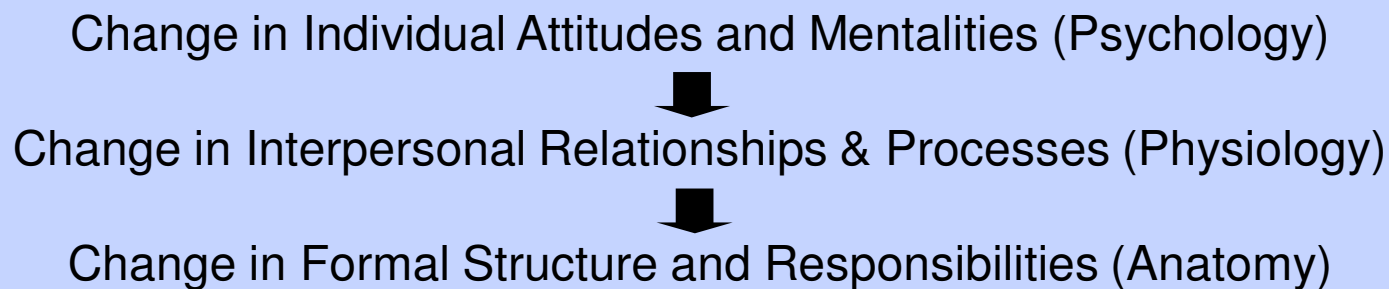
# Viewing Change Emerging Approach

Source: Bartlett and Ghoshal 1989

## Traditional Change Process



## Emerging Change Process



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## Quotes

***“To manage each [stakeholder] relation you must be well prepared, but you do not have to know everything in advance. In a way, you need to manage expectations.”***

***- Hans Bool***

***“You need to ensure that all key relationships are managed explicitly - if relationships fail, then you are more likely to fail.”***

***- David Walker***

***“ . . . any change process . . . is only successful in the long run if the stakeholders truly adopt and sustain the change.”***

***- Barbara McConnell***

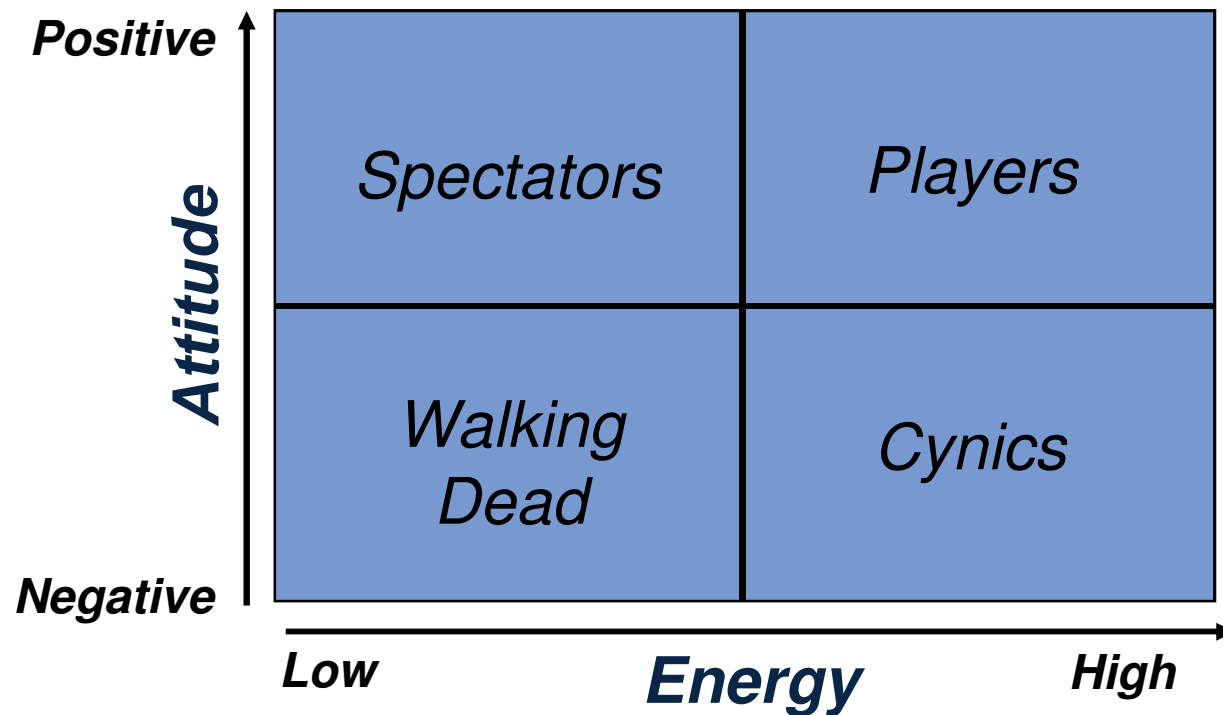
## Polling Question #4

Who are the primary stakeholders for a major change effort?

1. Senior Management
2. Human Resources
3. Customers/Vendors/Partners
4. Employees
5. All of the above



***Identify stakeholders and develop strategies for each***



# Determinants of Change Strategies

- *Degree of Resistance*
- *Target Population*
- *The Stakes*
- *Time Frame*
- *Expertise*
- *Dependency*

## Identifying Stakeholders

# Communications Matrix

Stake-holders	Drivers	Pain Points	Messages	Methods	Frequency	Media
Company Leadership	Efficiency Consistency Profits	Keep Vision Make numbers	Driving cost Assuring compliance	Status reports Briefings	Weekly at first	Personal email Face-to-face
Human Resources	Customer Svc Smooth Implementation	Stakeholder Resistance	More effective organization	Update Meetings	Daily at first	Face-to-face Email updates
Employees	Stronger Company	Am I affected negatively	End result will be better	Bulletins Town Halls	Whenever significant action	Portal Posts Group Meets
Vendors/Partners	Stronger business partner	Disruption of service	End result will be better	Briefings Bulletins White Papers	Monthly	Face-to –face Email
Customers	Better cost structure	Disruption of quality and delivery	End result will be better	Public notices Personal note to prime	At beginning and periodically throughout	Public and private notices
Shareholders	Better cost structure, stronger org.	Temporary drop in productivity	Stronger long term profits	Letters and media announcements	At beginning and at regular intervals	Letters and media

**Plus Government, Community, Investors, Competitors, Others**

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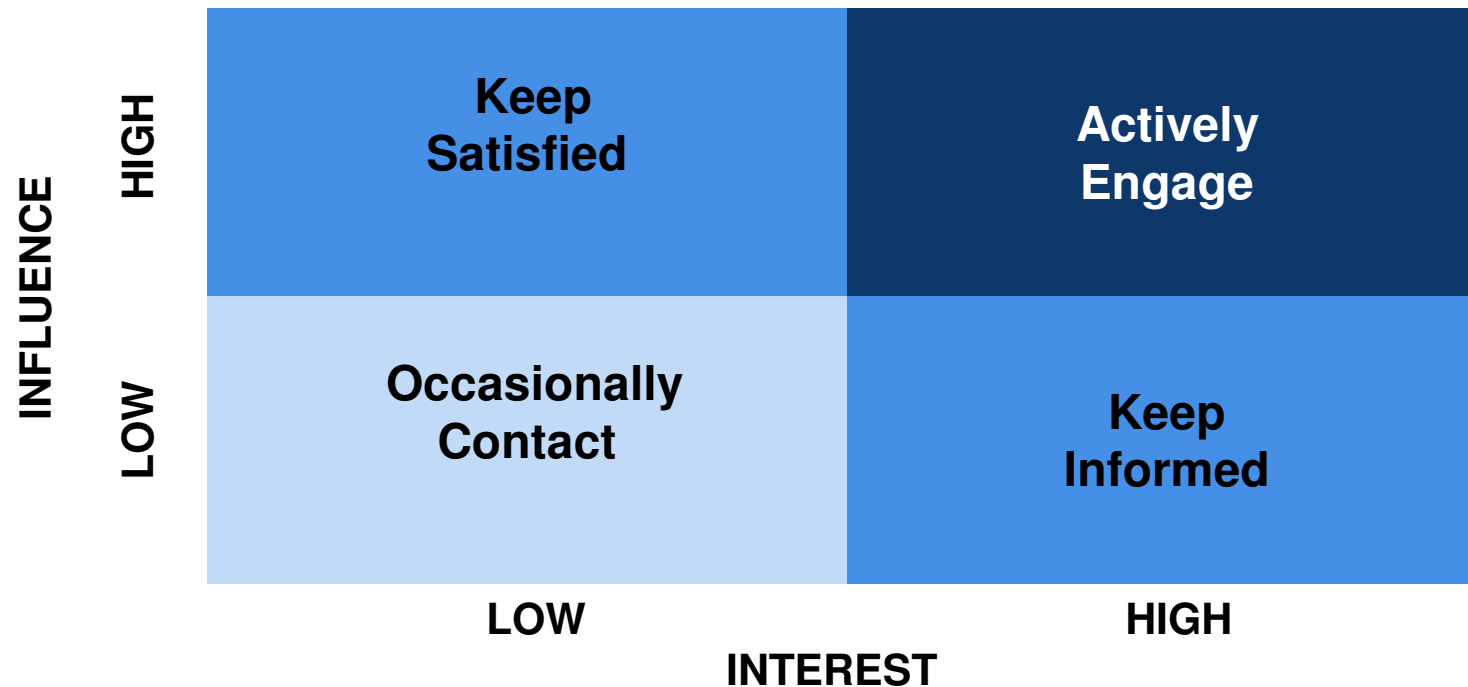
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- Types of stakeholder: Different stakeholders need different treatment.
- Researching stakeholders: Many ways to find out about stakeholders.
- Stakeholder interests: find what they *really* want.
- Stakeholder personal analysis: getting inside an individual's head.
- The nature of opposition: knowing your 'enemies' in change.
- The nature of support: knowing and managing your allies. Map power vs. level of support.

# Interest-Influence Grid



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# Thoughts on Change Management

***“Everyone thinks of changing the world, but no one thinks of changing himself.”***

***-Leo Tolstoy***

***“If you don't like something change it; if you can't change it, change the way you think about it.”***

***-Mary Engelbreit***

***“Tell me and I'll forget, show me and I may remember, involve me and I'll understand.”***

***-Chinese Proverb***

## Polling Question #5

 Does your organization?

1. Affirmatively manage change
2. Sometimes manage change efforts
3. Have no real pattern of consistent change management
4. Generally is “managed by” change
5. Have no pattern or don’t know



# What is Change Management?

- A structured approach / model / plan / methodology to managing the process of change in individuals, teams, organizations, and societies
- Two broad types of Change Management:
  - Anticipative / Proactive – the management of change in a planned and systematic fashion with the goal to more effectively implement new processes or systems in an organization (e.g., restructurings, outsourcing, new systems)
  - Reactive / Knee-jerk – the response to change over which the organization has little or no control (e.g., environmental changes, legislative changes, social/political upheaval, competitive actions, market/economic trends)

# Importance of Managing Change

Source: Conference Board

- A recent study of 540 CEO's showed:
  - 82% identified Change Management as a priority
  - 99% expect an increased need for Change Management

# Characteristics of Managing Change

Source: SHRM

- A 2007 Survey of 305 organizations showed:
  - Overall, organizations experience 2.1 major changes per year
  - 77% of HR departments do not have full-time staff to devote to Change Management
  - Only 35% of organizations have a Change Management Model
  - 72% reported communication breakdowns in their organizations

- A 2008 study concluded that:
  - Over 80% of all projects fail when change/transition issues are not addressed
  - Change takes longer and needs more resources 100% of the time
  - 70% of the time, organizations do not have the internal skills to deploy a comprehensive change program
  - Less than 20% of all acquisitions produce the desired benefits, largely due to lack of Change Management and cultural integration plans

# Ingredients for Successfully Managing Change

- Implement a comprehensive and coordinated change management program: **DISCOVER, DEVELOP, DETECT.**
- Identify “change agents” and engage people at all levels in the organization.
- Ensure the message comes from the top, and executives and line managers are “walking the talk.”
- Make change visible with new tools and/or environment.
- Ensure clear, concise, and compelling communication.
- Integrate change goals with day-to-day activities, e.g., recruiting, performance management, and budgeting.
- Address short-term performance while setting high expectations about long-term performance.

# Ingredients for Successfully Managing Change

- Help management avoid attempts to short circuit the change management process.
- Foster change in people's attitudes first, then focus on change in processes, then change in the formal structure.
- Manage both supporters and champions, as well opponents and possible detractors.
- Accept that all people go through the same steps – some faster, some slower – and it is not possible to skip steps.
- Build a safe environment that enables people to express feelings, acknowledge fears, and use support systems.
- Acknowledge and celebrate successes regularly and publicly!

# Techniques for Managing Change

Source: Kurt Lewin, 1935

## Un-Freezing

*Burning platform*  
*Challenge*  
*Command*  
*Evidence*  
*Destabilizing*  
*Education*  
*MBOs*  
*Restructuring*  
*Rites of passage*  
*Setting goals*  
*Visioning*  
*Whole-system planning*

## Transition

*Boiling the frog*  
*Challenge*  
*Coaching*  
*Command*  
*Education*  
*Facilitation*  
*First Steps*  
*Involvement*  
*Open Space*  
*Re-education*  
*Restructuring*  
*Stepwise change*

## Re-Freezing

*Burning bridges*  
*Evidence stream*  
*Golden handcuffs*  
*Institutionalization*  
*New challenge*  
*Rationalization trap*  
*Reward alignment*  
*Rites of passage*  
*Socializing*

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# Thoughts on Change


***“They say that time changes things, but you actually have to change them yourself.”***

***-Andy Warhol***

***“How wonderful it is that nobody need wait a single moment before starting to improve the world.”***

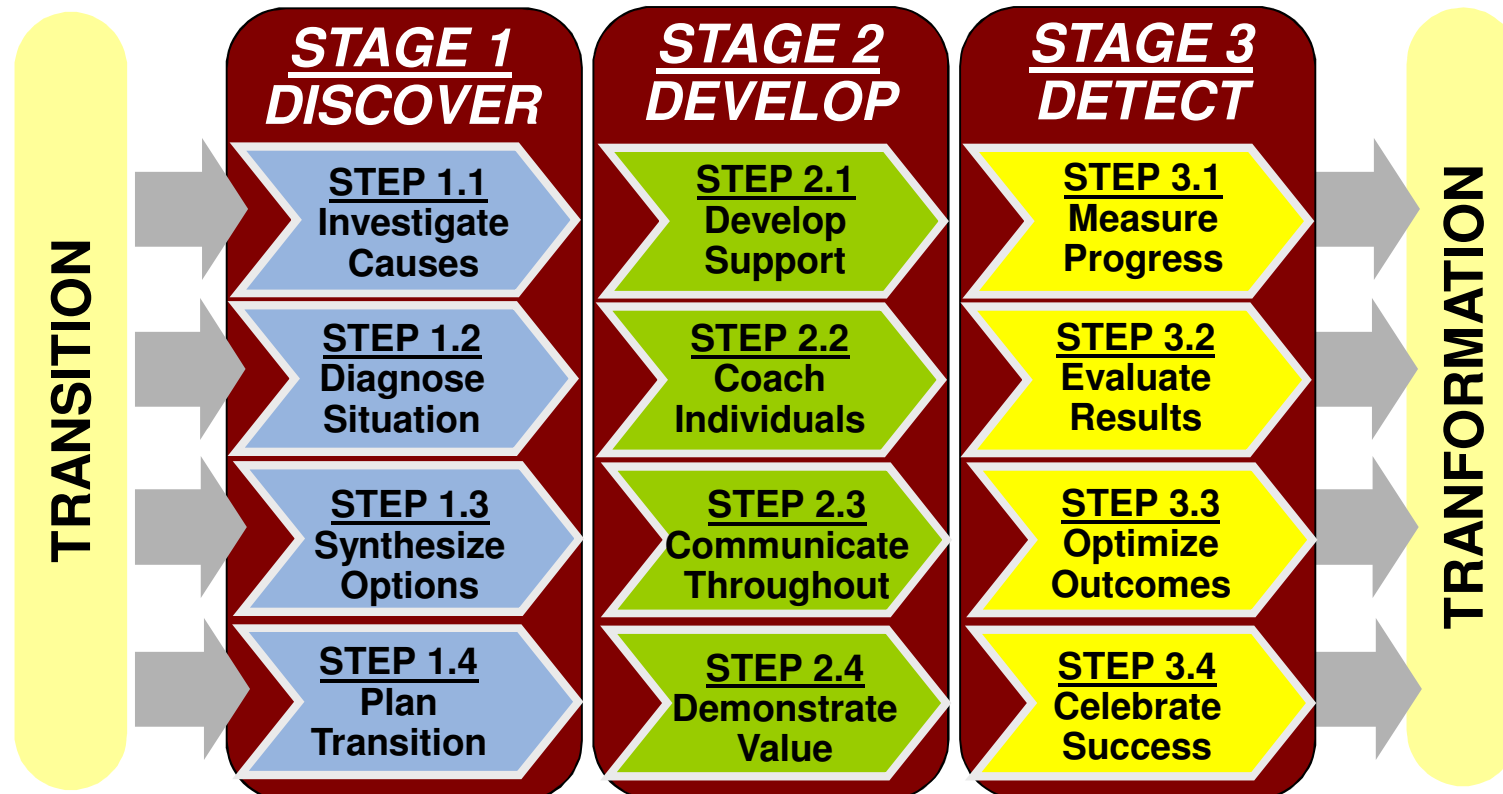
***-Anne Frank***

## Polling Question #6

-  Does your organization:
1. Have an explicit model?
  2. Have a defined overall approach?
  3. Have a sort of a consistent process?
  4. Implement every change *ad hoc*?
  5. Have no model or don't know?

# A Comprehensive Methodology

Source: Jeitosa, 2008



# Steps in the Methodology

Source: Jeitosa, 2008

## **STAGE 1** **DISCOVER**

### 1.1 Investigate Causes

- Determine goals and objectives
- Interview key leaders
- Survey employees
- Review current environment

### 1.2. Diagnose Situation

- Determine processes involved
- Identify stakeholders affected
- Determine change readiness
- Evaluate supporting structures

### 1.3. Synthesize Options

- Determine future state vision
- Define cultural imperatives
- Define alternative strategies
- Develop recommendations

### 1.4. Plan Transition

- Evaluate types and levels of effort
- Determine resources required
- Build change management plan
- Gain leadership approval

## **STAGE 2** **DEVELOP**

### 2.1. Develop Support

- Identify internal change agents
- Identify stakeholder positions
- Provide tools and templates
- Develop reference materials

### 2.2. Coach Individuals

- Develop coaching approaches
- Create training/mentor programs
- Support change leaders
- Provide coaching/mentoring support

### 2.3. Communicate Throughout

- Create communication strategies
- Develop communication plan
- Assign roles and develop messages
- Execute, monitor, and refine

### 2.4. Demonstrate Value

- Create opportunities to showcase
- Provide leaders with examples
- Publish successful case stories
- Link results to performance

## **STAGE 3** **DETECT**

### 3.1. Measure Progress

- Identify appropriate metrics
- Define collection processes
- Monitor acceptable levels
- Report and communicate results

### 3.2. Evaluate Results

- Conduct regular pulse surveys
- Analyze progress against goals
- Refine and revise approaches
- Implement additional metrics

### 3.3. Optimize Outcomes

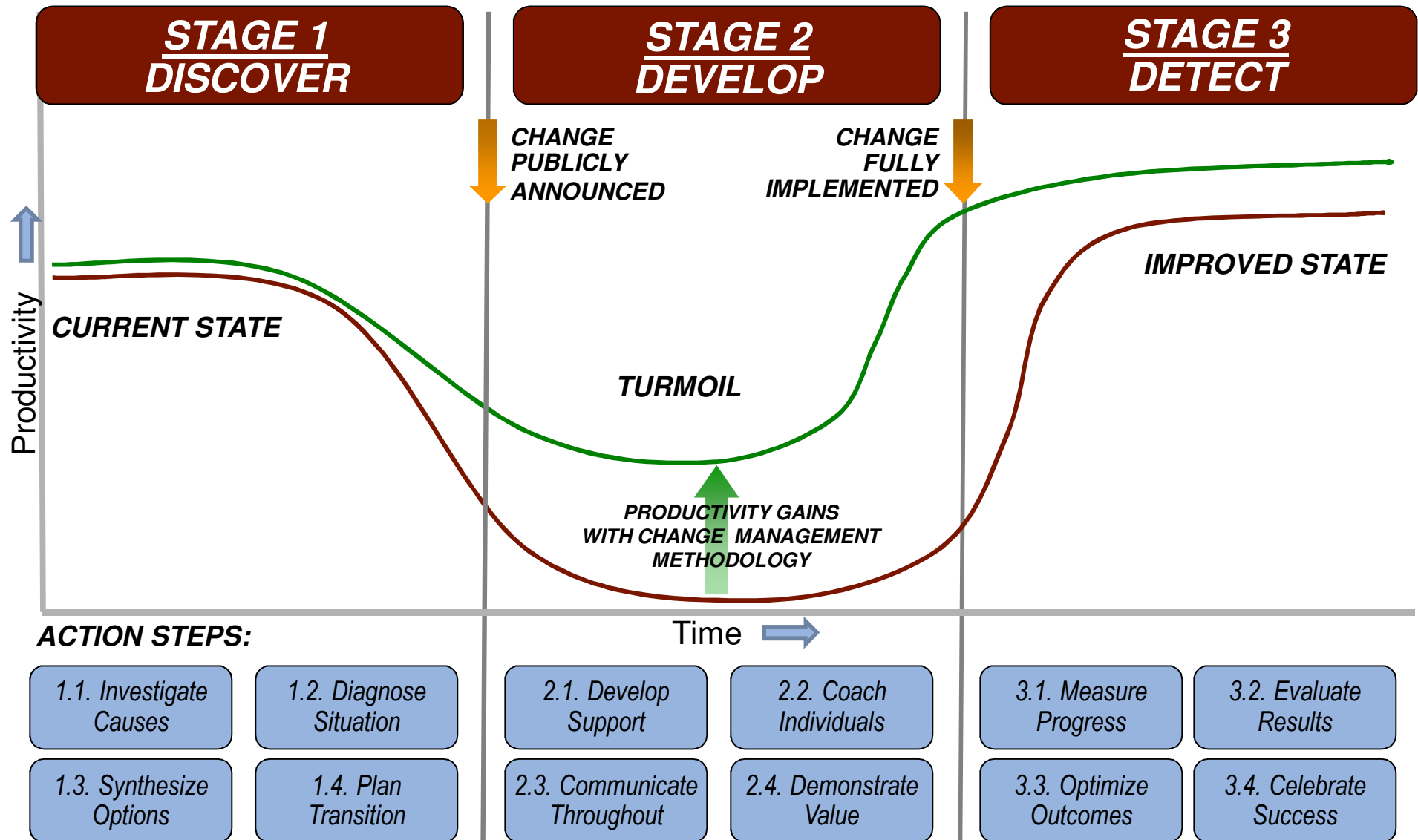
- Seek areas for improvement
- Revise goals and objectives
- Support incremental change
- Lessons learned for future changes

### 3.4. Celebrate Success

- Congratulate and recognize
- Reinforce goals and successes
- Reward early adopters
- Encourage ongoing commitment

# A Predictable Progression

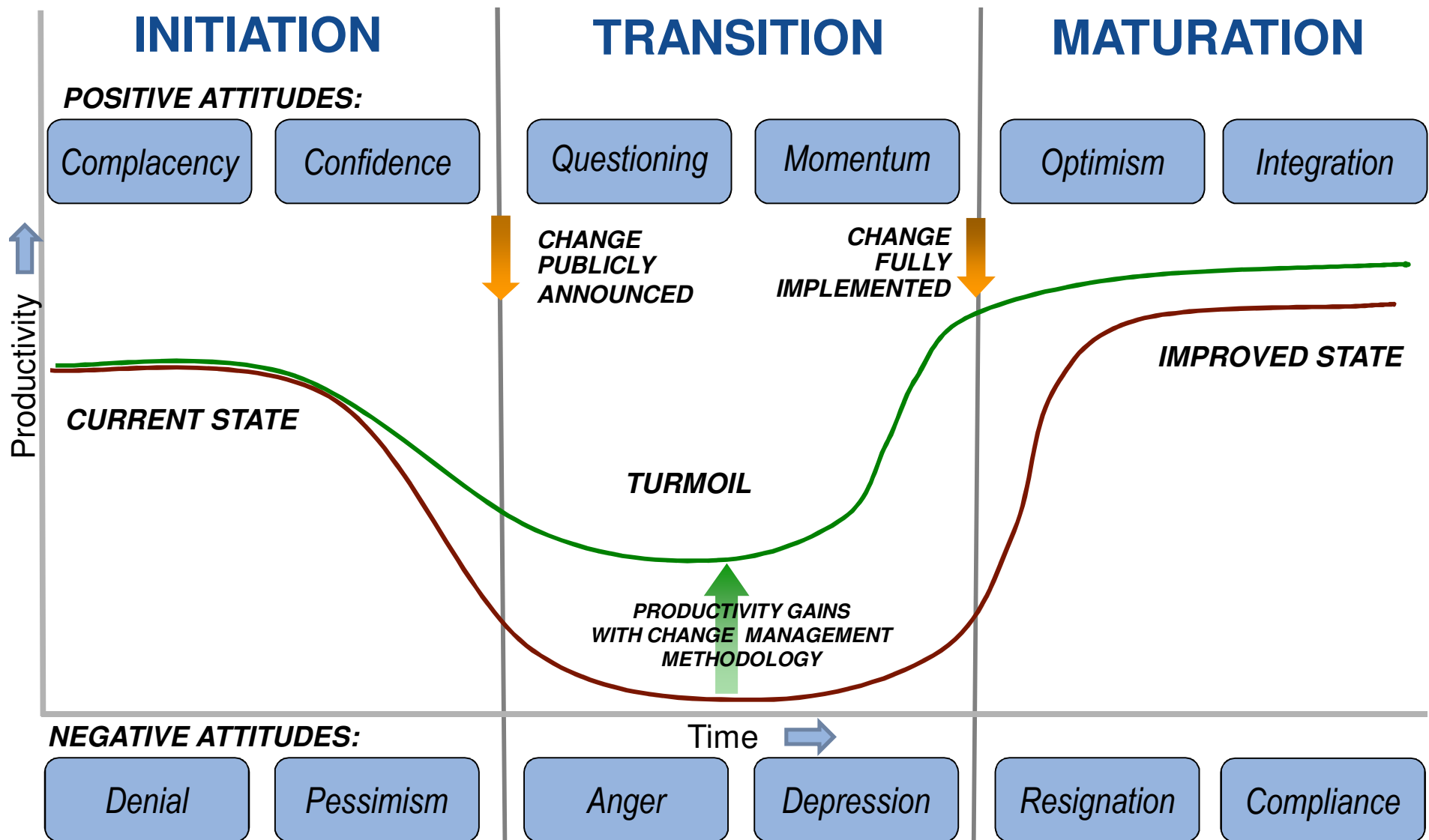
Source: Jeitosa, 2008



Using a Model

# Human Progression through Change

Source: Jeitosa, 2008



# Change Intervention Strategies

Source: Jeitosa, 2008

	<b>DISCOVER</b>	<b>DEVELOP</b>	<b>DETECT</b>
<b>POSITIVE</b>	<p><u>Complacency</u></p> <ul style="list-style-type: none"><li>• Explain the need for change</li><li>• Define the benefits</li><li>• Define the alternative to change</li></ul> <p><u>Confidence</u></p> <ul style="list-style-type: none"><li>• Describe the decision process</li><li>• Describe the change process</li><li>• Reinforce the benefits</li></ul>	<p><u>Questioning</u></p> <ul style="list-style-type: none"><li>• Provide research &amp; resources</li><li>• Provide channels &amp; forums</li><li>• Provide accurate answers</li></ul> <p><u>Momentum</u></p> <ul style="list-style-type: none"><li>• Provide forum for exchanges</li><li>• Publish and recognize success</li><li>• Reinforce positive actions</li></ul>	<p><u>Optimism</u></p> <ul style="list-style-type: none"><li>• Reinforce positive actions</li><li>• Recognize those exhibiting</li><li>• Reiterate benefits of change</li></ul> <p><u>Integration</u></p> <ul style="list-style-type: none"><li>• Recognize early accepters</li><li>• Reinforce benefits of change</li><li>• Help accepters help others</li></ul>
<b>NEGATIVE</b>	<p><u>Denial</u></p> <ul style="list-style-type: none"><li>• Provide evidence</li><li>• Demonstrate outcomes</li><li>• Create future vision</li></ul> <p><u>Pessimism</u></p> <ul style="list-style-type: none"><li>• Frame the problem</li><li>• Describe the business value</li><li>• Position “what’s-in-it-for-me”</li></ul>	<p><u>Anger</u></p> <ul style="list-style-type: none"><li>• Provide venting space</li><li>• Provide objective information</li><li>• Acknowledge validity of feelings</li></ul> <p><u>Depression</u></p> <ul style="list-style-type: none"><li>• Provide examples/case studies</li><li>• Paint future scenarios</li><li>• Provide safety net</li></ul>	<p><u>Resignation</u></p> <ul style="list-style-type: none"><li>• Provide more data as needed</li><li>• Provide forum for questioning</li><li>• Reinforce “what’s-in-it-for-me”</li></ul> <p><u>Compliance</u></p> <ul style="list-style-type: none"><li>• Recognize early accepters</li><li>• Reinforce benefits of change</li><li>• Help accepters help others</li></ul>

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## Some Perspectives

***“Both knowledge about and the ability to execute successful change strategies make the HR professional exceptionally valued.”***

***- Susan M. Heathfield***

***“. . . Change management is an ongoing feature of the leader's job. But a frequently overlooked component is human resources . . .”***

***- Mark J. Dawson and Mark L. Jones***

***“HR professionals need to rise to the challenge of shaping change, rather than simply sweeping up afterwards. “***

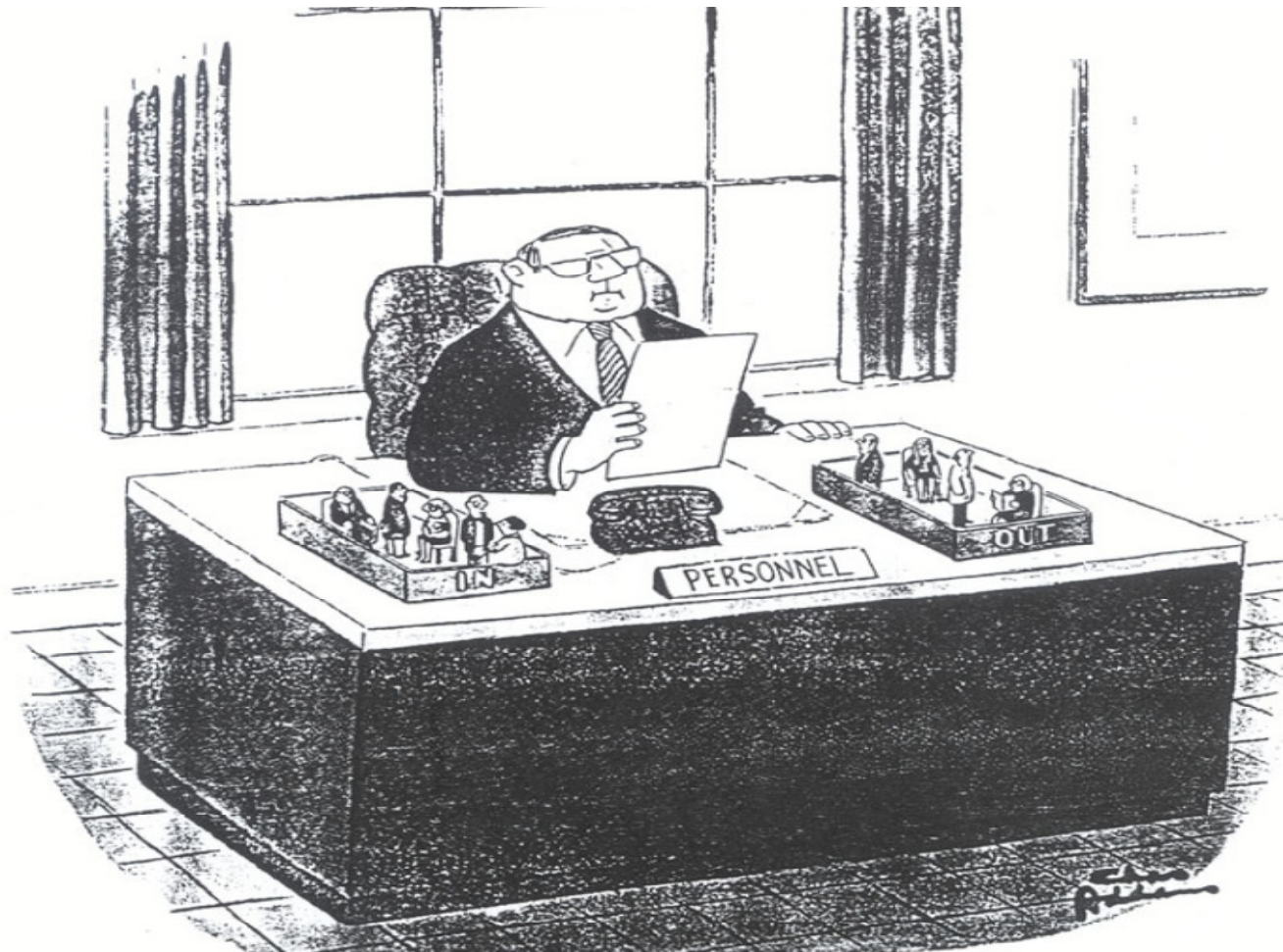
***- Richard Wittington, et al***

## Polling Question #7

- What is HR's role in managing change in your organization?
1. Manages the global process and has designated experts
  2. Manages the process in certain cases
  3. Participates in the management of the change
  4. Another function manages the process
  5. No one manages the process or don't know who manages it

## *Coordinating Change - HR's Role*

# What Value Does HR Add?



# Components of HR's Role in Change

- Keepers of the Culture
- Experts in Organization Development
- Masters of Change
- Gurus of Metrics
- SME's on all Things People
- Strategic Partners
- Inter-Departmental Coordinators
- Employee Advocates

# Ulrich's Model for HR

Source: Dave Ulrich, 1997



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## One More Perspective

***“Change is the law of life.  
Those who look only to the  
past or present are certain  
to miss the future.”***

***–John F. Kennedy***

## Conclusion

# Some References on Change

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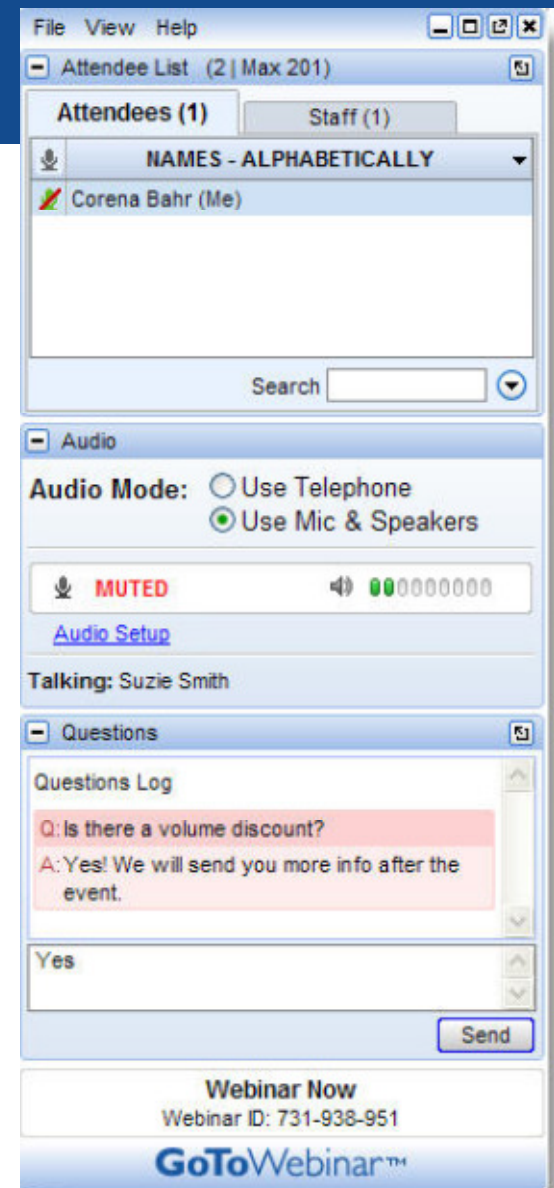


## Conclusion

## Q&A

If you'd like to submit a question.....

Please type your question into the Questions pane and click the send button.



## Conclusion

# Thanks for your participation

*Merci*

*Obrigada*

*Ευχαριστω*

*Danke schön*

*Kiitos*

*Tack*

*Gracias*

*Dank u*

*Grazie*

*Shukriya*

*Tesekkür ederim*

*Takk*

*Terimah Kasih*

*Krop Kuhn Kah*

*Dziêkujê*

*Arigato*

*Asante Sana*

*Go Raibh Maith Agat*

*Thank You!*

谢谢

[karen.beaman@jeitosa.com](mailto:karen.beaman@jeitosa.com)

[www.jeitosa.com](http://www.jeitosa.com)

## *Conclusion*

# Upcoming IHRIM Events

January 27, 2010

**Technology Meets HR: Selecting and Justifying the Right Solution**  
**IHRIM Webinar**

February 10, 2010

**The NEW Wellness Initiative – Actions Not Words**  
**IHRIM Webinar**

February 18, 2010 (exam on March 26)

**IHRIM's Certification Exam Preparation Course**  
**Minneapolis, MN**

March 19, 2010 (exam on April 16)

**IHRIM's Certification Exam Preparation Course**  
**Bethesda, MD**

# HRCI Credit



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## Conclusion

# About Karen Beaman



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[karen.beaman@jeitosa.com](mailto:karen.beaman@jeitosa.com)

- Founder and CEO of Jeitosa, a global business consultancy focused on making global business possible.
- Responsible for leading the team to build the strategy for Workday's new global Human Capital Management offering.
- Previously responsible for ADP's professional services across the Americas, Europe, and Asia/Pacific.
- Co-founder and Editor-in-Chief of the *IHRIM Journal* and Program Chair for IHRIM's Global HRIT Forum.
- Published works in the fields of Linguistics, Humanities, Human Resources, and Information Technology:
  - *Boundaryless HR: HCM in the Global Economy* (2002)
  - *Out of Site: An Inside Look at HR Outsourcing* (2004)
  - *Common Cause: HR Shared Services Delivery* (2006)
  - *HR Frontiers: Shifting Borders and Changing Boundaries* (2008)
- Recipient of IHRIM's Summit Award in 2002, honoring her lifetime achievements in the field of HR and HRIT.
- B.A. from Old Dominion and an M.S. from Georgetown University; Ph.D. candidate in Sociolinguistics.
- Fluent in English, German, and French; conversational Spanish and Portuguese.

## Conclusion

# About Mike Kent



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- Michael L. Kent is a Vice President and Executive Consultant, of Jeitosa Group International ([www.jeitosa.com](http://www.jeitosa.com)), a worldwide strategic business consultancy focused on making global business possible.
- At Jeitosa, he brings his long experience as an HR practitioner, with broad and deep. experience in virtually every function of HR and Administration, to assist Jeitosa clients with their strategic challenges in areas including change management, talent management, business ethics, global diversity, mergers and acquisitions and service delivery.
- Mike is a lifelong HR practitioner, having headed HR at leading companies, including salesforce.com, Farmers Insurance Group, Zurich Personal Insurance and Empire Blue Cross & Blue Shield. While at Farmers, his department won first place in the large company category of the National HR Service Excellence Survey. Mike started his career at ITT Corporation, then the world's largest conglomerate.
- He has lived and worked overseas on several occasions and is conversant in French, German and Portuguese. In 2005, Mike authored the chapter on Business Partnering in *The Successful HR Executive*. He is certified by SHRM as a Senior Professional in Human Resources and by UC Berkeley in Mediation for Dispute Resolution. He is a board member of the HR Strategy Forum and the Hale Foundation.
- Mike has an MBA in International Business from Columbia and a BA in Psychology from Yale. He and his wife reside in Oakland, CA, named by Rand McNally as the city with the best weather in the US.