

Change Management

The image shows a close-up, low-angle view of a modern building's facade. The facade is composed of a grid of windows, with each window unit featuring a repeating pattern of blue and yellow panels. The perspective is from a low angle, looking up at the building, which creates a sense of height and scale. The lighting is bright, casting shadows that emphasize the three-dimensional structure of the window frames. The text "Change Management" is overlaid in the top left corner in a white, sans-serif font.

Agenda

- Transformation – Why Change?
- Change Model
 - Analyze
 - SATA Analysis
 - Systems Thinking
 - Mental Models
 - Design
 - Develop
 - Implement
 - Evaluate
- Change SOP
- Resources

Objective

To create a standard operating procedure (SOP) for leaders that provides guidelines to how to successfully navigate through a change project/initiative.

Transformation



Transformation

- Occurs when a person or an organization chooses growth or change
- Focuses on long term sustained growth
- Increases organizational and self awareness
- Becomes a part of culture
- Transcendence – growing beyond the current limitations or current state
 - Applied to both the self and an organization
- Not about teaching new skills, but growing together
- The goal for change is transformation

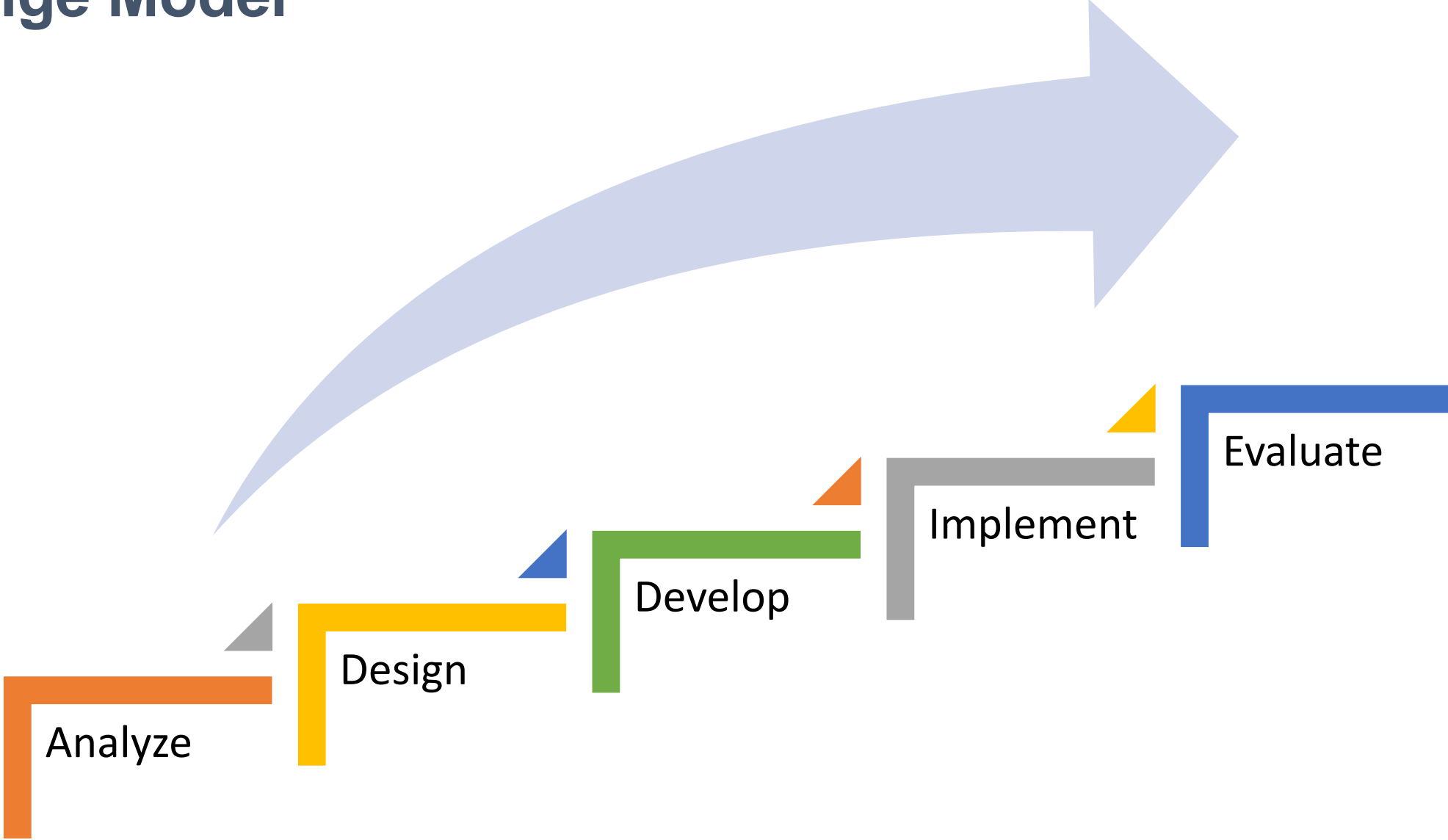
“The capacity to learn is a gift; the ability to learn is a skill; the willingness to learn is a choice.”

-Brian Herbert

Change Model



Change Model





Analyze

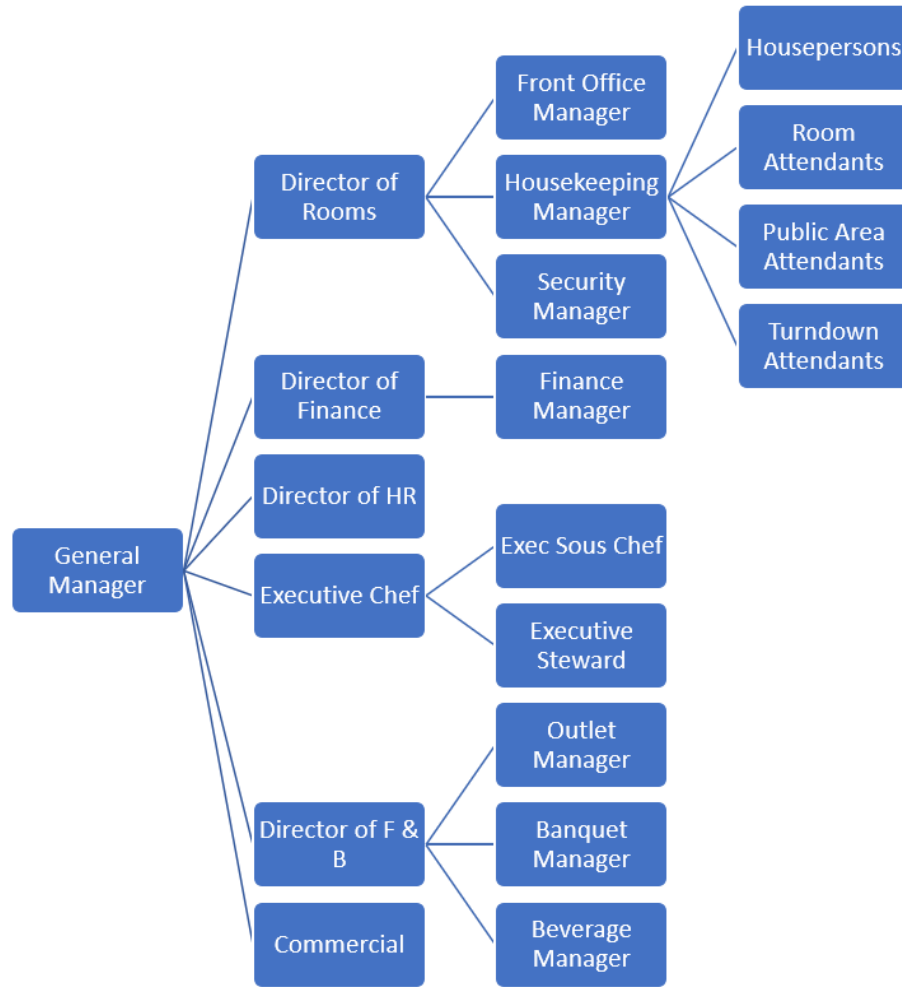
- Once change initiative or opportunity is identified a thorough analysis of the following must be conducted:
 - Future State – What is the desired outcome? How will we get there? Who is involved in the change?
 - Current State – What is currently happening? Who are the players involved? Why do we need to change?
- The analysis will address change impact on:
 - People
 - Processes/Policies
 - Operations
 - Organization

Analyze

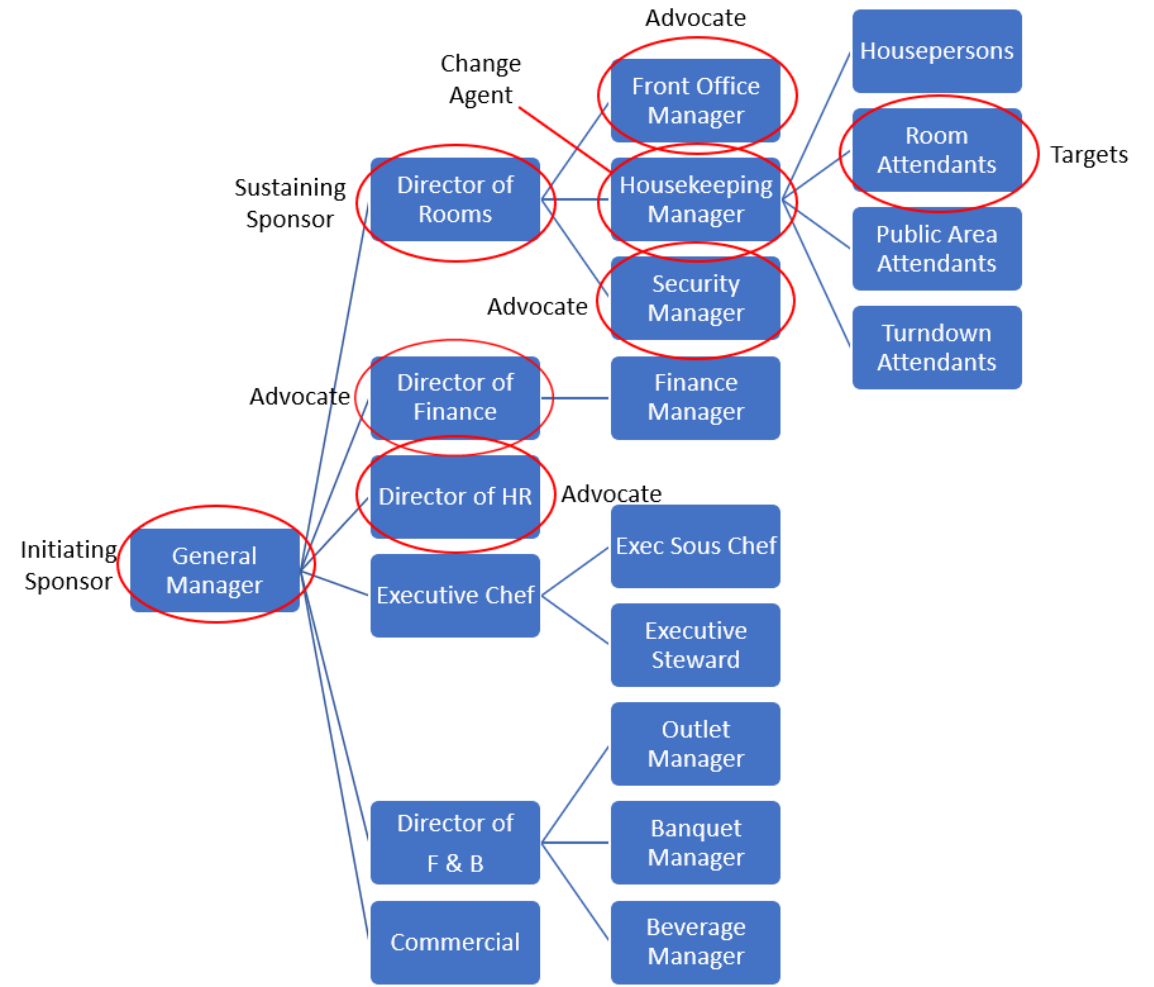
SATA Analysis

- An analysis to identify the different roles and individuals who are involved in the change
- Flow chart of Department
- Used to determine impact and authority
- Simple vs Complex
- SATA Roles – Label them
 - Sponsors – Decision makers that needs to be involved in process
 - Initiating Sponsor – Ultimate decision maker
 - Sustaining Sponsor – Decision maker, but not primary
 - Advocates – Partners that can help influence change
 - Targets – Identify who the change is going to impact
 - Agents – Change agents responsible for the actual project/initiative
- Not all people on Flow Chart will get designation, as they might not be involved in change

Analyze



Hotel Flow Chart



SATA Analysis



Analyze

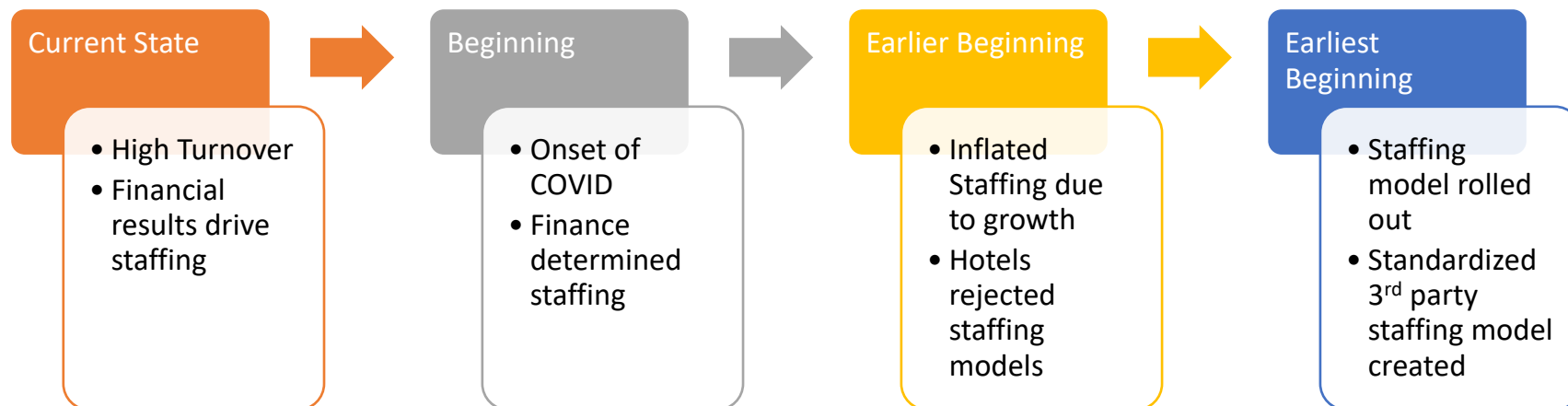
Systems Thinking

- Systems are groups of interacting, interrelated or interdependent components that form a larger complex whole
- Systems can be simple or complex
- Systems can influence over time, compounded to create long term outcomes
- Systems thinking allows to examine the interconnectedness of an organization, department, or location
 - How one thing can influence others
 - Example 1: if the guestroom is not clean it can impact the entire guest stay
 - Example 2 : how connected all guest operations are to the PMS to facilitate the experience
 - Example 3 : high turnover created by condensed staffing guidelines that create higher demand on employees

Analyze

Systems Thinking – Look Back Exercise

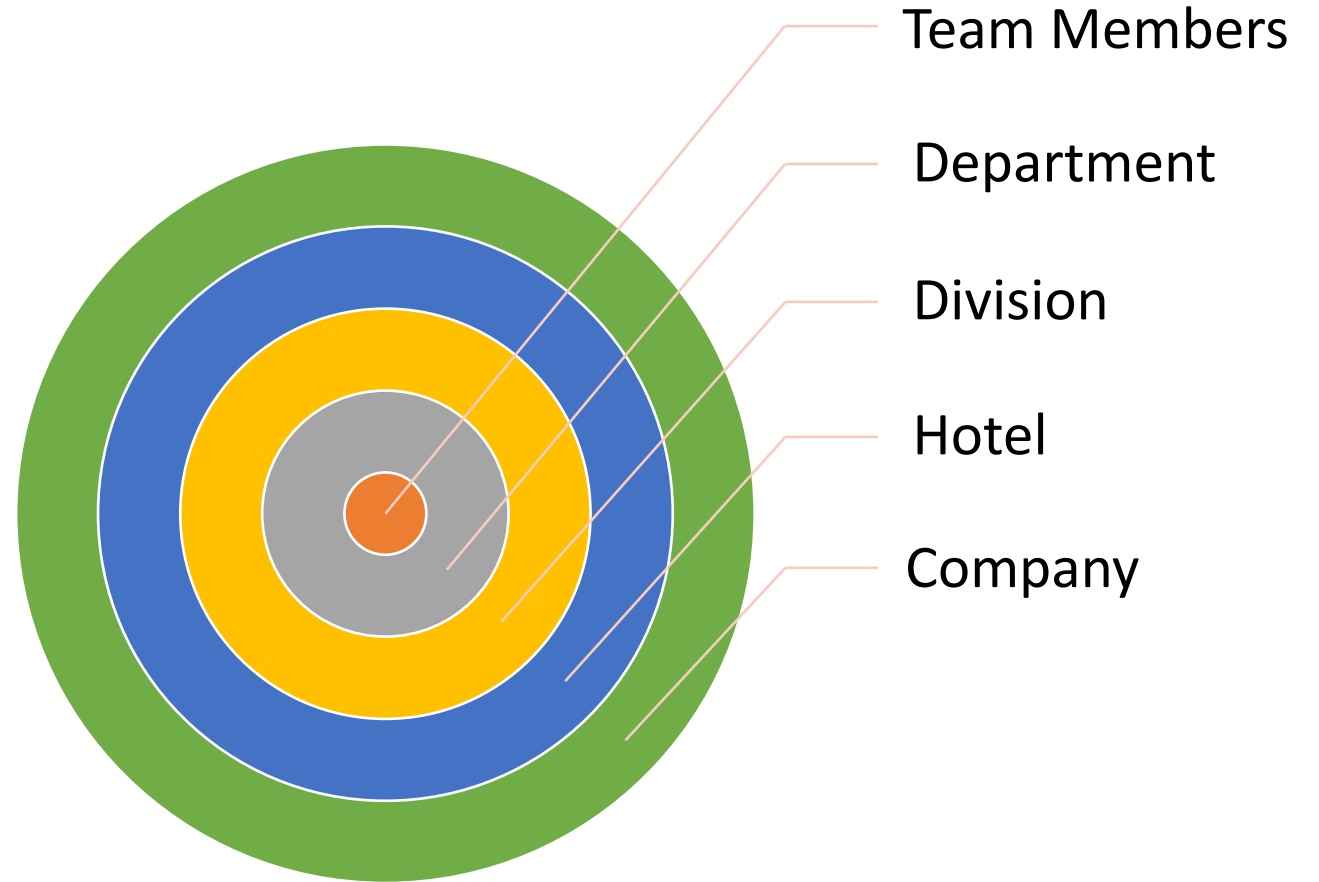
- Identify the current state of the opportunity of change
- Think back to what it looked like before, were there any changes?
- Think back further, identify anything that impacted the previous state
- Think back to the beginning, what could have been a contributing root change that has influenced and impacted previous states



Analyze

Systems Thinking – System Connection

- Draw large circle to represent current state or area of change
- Draw smaller circle inside to show sub areas of current state that are impacted
- Draw smaller circle to show sub area of previous
- Continue as far as you can to identify all that might be impacted by change.
- Can be processes, systems, or even people





Analyze

Mental Models

- Be cognizant of influences of the mind on change for both self and others
- Predetermined/preconceived perspectives and thoughts
 - Influence the way we act and respond to new ideas, people, thoughts, etc.
- Created from experiences, culture, education, etc.
- Can be better understood through meaningful dialogue and self discovery
- Can be for an individual, group, or even
- Self awareness of own mental models is critical to mitigate their influence on decisions and reactions to change



Design

- Take information collected from Analyze Step
- Determine what the ideal state would look like:
 - What is the desired outcome?
 - Who does it impact?
 - How will we get there?
 - Why is it important to change?



Design

- Create an image of the new state and what it looks like
- Create a plan for how the new state will be achieved
- Design can be as simple as an idea or as complex as a new process
- Be creative, no limits!
 - Don't focus on constraints of money or authority
- Solicit input and involvement of Advocates, Sponsor and Targets
- Focus on how future state could impact other areas



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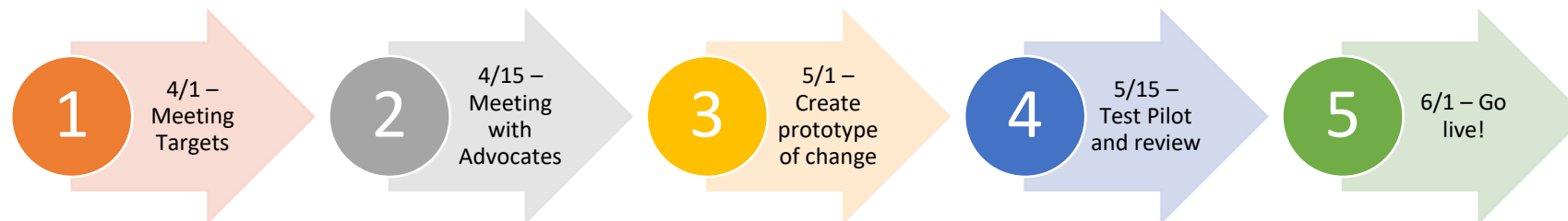
Design

Journey Roadmap

- Map out a process or plan for implementation
- Identify key hurdles or milestones that will need to be met to implement change
- Correlate hurdles to dates
 - Understand these can be moving targets
- Journey is flexible and can change at any time
- Used to monitor progress and achievements



Journey Roadmap Example:





Develop

- Take Design ideas and put into action
- Create prototype of desired state
 - Create supporting materials as needed
 - If creating a new program, create:
 - Timeline
 - Program Overview
 - Implementation plan
- Understand this is a work in progress
- Use systems thinking to ensure that all potential areas are addressed
- Review prototype with Targets, Sponsors and Advocates
- Determine how success will be monitored or tracked



Develop

Mind Map

- Exercise to ideate collaboratively with others to identify potential path forward
- Participants provide their thoughts collectively
- Everything captured, no bad ideas
- Then combined into themes
- Creates potential roadmap for change or areas to focus on as change is navigated

Develop

Mind Map

Can use sticky notes or white board to capture ideas

1. Identify key topic of mind map
2. Each participant adds key concepts that connect to the topic
3. Use colors and images
4. Connect the ideas that are related, combining into themes
5. Add supporting materials as needed





Develop

- Convert prototype to working model
- Take input and feedback from Targets, Sponsors and Advocates and amend as needed
- Finalize all materials
- Finalize measurement tools for success of change and collect any baseline data
 - Guest Surveys?
 - Team Member Experience Survey?
 - Independent survey

Implement

- Test Pilot the change
 - Utilize small group, if possible
- Conduct feedback sessions throughout implementation with Targets, Sponsor and Advocates
- Be flexible, make changes as needed
- Gather data that can used to measure the change

“A person who never made a mistake never tried anything new.”

-Albert Einstein



Implement

Test Pilot Guidelines

- Small subgroup of the total population
- Group that can potentially be moved from Targets to Advocates
- Look at performance of group
- Willingness to change/open to change

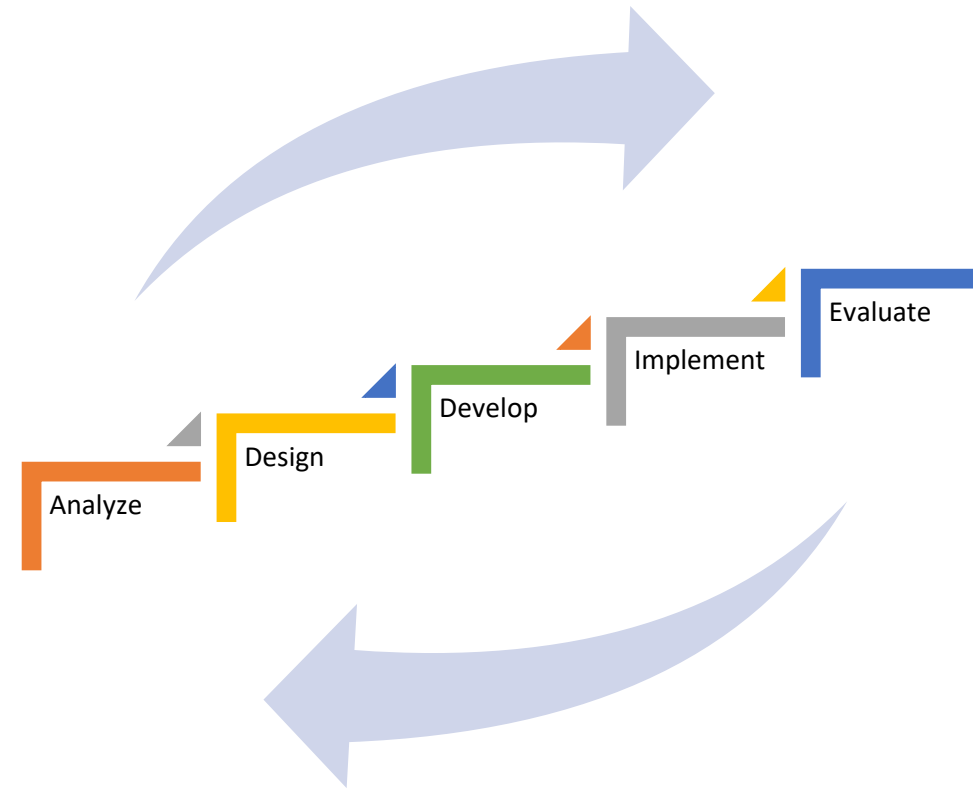


Evaluate

- Conduct Feedback sessions with Targets, Sponsors and Advocates
 - What went well?
 - What could have been more effective?
 - What was missed?
 - How does this impact the operation?
- Use measurement identified in Develop phase to determine if change was successful
- If not successful go back to beginning of the ADDIE process and make changes as needed
- If successful create plan for implementation for larger population or total roll out
 - Make any changes as needed

Evaluate



- Change process can be circular
- Take feedback and data to re Design and Develop as needed
- Failure is okay
- Change model allows for movement between different phases of process



Change SOP

Standard Operating Procedure (SOP)

- Overview of training and quick reference guide

CHANGE MANAGEMENT SOP	CHANGE MANAGEMENT SOP	CHANGE MANAGEMENT SOP
<p>The Change Management Standard Operating Procedure (Change SOP) is designed to assist leaders when they are navigating and implementing change within their organization. The Change SOP is designed to be a guideline to help mitigate risks as a leader manages through change or a change initiative (both referred to as "change" throughout document). There is not a set blueprint or policy on how to navigate through change, but rather best practices and tools that can assist with navigating the change.</p>	<p>Please see Change Management Training deck for information regarding Systems Thinking.</p>	<p>The test pilot needs to be flexible as there will be changes that will arise.</p>
<p>Pre and post work is required when determining the best course of action for a change initiative. A basic framework is provided: analyze, design, develop, implement, and evaluate. This framework will be detailed throughout this Change SOP.</p>	<p>When working with distinct roles of the SATA Analysis it is important to be aware of mental models, preconceived notions, and thoughts, to determine how they might influence the change process. This is a critical process for all Targets. Understanding the mental models can be achieved through the dialogic method. The Agent should also be aware of their own mental models that might influence the change inadvertently.</p>	<p>Evaluate: After the test pilot is completed and deemed to be done, it is important to evaluate the test pilot and change. It is important to conduct final feedback sessions with Targets, Advocates and Sponsors to review the pilot. It is imperative that the Change Agent is aware of their own mental models regarding the process, and welcome and invite honest feedback from the pilot.</p>
	<p>Design: After the analysis, for both the current state and desired outcome, it is time to design the change and all relevant processes. The design phase requires creativity. It is a forum to create the image of what the ideal state could be or what the end goal for the change is. During the design phase it is also appropriate to create a roadmap, identifying relevant hurdles and potential corresponding periods for each.</p>	<p>When conducting the feedback sessions, the Agent should prepare questions in advance to prepare for what feedback is needed for the evaluation. It is also important to review any quantitative and qualitative data that is gathered to measure success of change.</p>
<p>Analyze: Once a change initiative or an opportunity for changing current processes or programs has been presented an analysis of the current state of operations is needed. This analysis will look at the impact of people and operations and will ensure the change aligns with organizational competencies and principles. There are many ways to do an analysis of the current state, but it is important to focus on a SATA Analysis, Systems Thinking and Mental Models.</p>	<p>Consult with Targets, Advocates and Sponsors that were identified during the SATA Analysis. This will allow the Agent to gain a diversity of thought and perspectives around the change. The Design phase is more about creating possibilities rather than executing or squaring out all the details.</p>	<p>At the end of the Evaluate phase it is important to determine the next step of the change: is there a need for further analysis, design, and development or can the change be implemented for a larger population? The change model is designed to be flexible and allows for movement from one phase to the next and allows for reentry of previous phases.</p>
<p>A SATA analysis will need to be created to determine all impacted employees and to determine their role within in the change:</p> <ul style="list-style-type: none">• Sponsors – Decision makers that needs to be involved in process (GM)• Advocates – Partners that can help influence change (fellow partners like DOF, DHR)• Targets – Identify who the change is going to impact (how change is for)• Agents – Change agents responsible for the actual project/initiative (you)	<p>Please see Change Management Training deck for an example of a Journey Roadmap</p>	
<p>Please see Change Management Training deck for instructions on conducting a SATA Analysis.</p>	<p>Develop: The Develop phase is where the design comes into fruition. This is the phase where prototypes, materials, processes, etc. are created, the designs from the Design phase become tangible. Develop phase is when the entire change becomes evident, including all subcomponents and subsystems. Systems thinking again can be used during the Develop phase to identify impacts outside of the direct area of change.</p>	<p>Ideation sessions with Targets, Advocates, and Sponsors can be critical when brainstorming possibilities for change. A mind mapping exercise can foster collaboration and a diversity of thought around the entire process.</p>
<p>The person managing the change process is considered the Agent, to which this SOP is designed for their use.</p>	<p>Implement: Once complete with the Develop phase it is time to start testing the materials, processes and change in general. It is best to select a test pilot group before moving forward with full implementation. This will let you test the change and identify any gaps missed during the Design or Develop phases. When selecting a test pilot group, it is beneficial to identify a group that would welcome the new change and would be open to providing feedback. The test pilot should use Targets identified during the Analyze phase.</p>	<p>Please see Change Management Training for Mind Mapping exercise.</p>
<p>A system's thinking approach will also need to be incorporated to determine impacts of current and future states of change. Systems thinking will provide a mechanism to determine impacts of the change onto areas outside of department and identify issues that contributed to the change opportunity/current state. A simple look back exercise can identify such influences.</p>	<p>During implementation, regular feedback sessions with Targets, Advocate and Sponsors must be conducted to ensure change is successful and meets the organizational needs.</p>	<p>As part of the implementation, it is imperative to determine how the pilot's success will be measured. This can be done either through quantitative or qualitative data.</p>

Questions

- Questions?
- Feedback?