

e-change



A methodology specifically designed to help organizations improve their ability to manage people during change projects.

When an organization faces change, one of the most difficult areas for a project manager is dealing with the people involved; communicating with them so that they understand exactly what is being planned and dealing with their personal anxieties and agendas.

Changefirst has made it their business to help organizations improve their ability to manage people during change projects. Over the past 15 years or so, the company has been developing and refining their own change management methodology: People Centred Implementation (PCI).


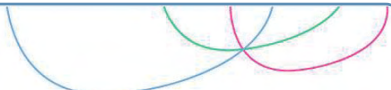
The PCI methodology has six organizational and local critical success factors. The organizational factors are:

- shared change purpose (have you convinced people that the change is required?)
- effective change leadership (does the project have this?)
- powerful engagement process (how will we involve, communicate, reward and train people)

The local factors are:

- committed local sponsors (Question: Are the line managers in place who you would prefer to use to promote the change?)
- strong personal connection (Question: Do individuals understand the consequences of not committing themselves to the change?)
- sustained personal performance (Question: How are we going to manage personal resistance to the change, thus enabling people to adapt to the change and use it to increase their performance?)

To achieve these goals, Changefirst developed a set of complementary tools, processes and worked examples. There's a difference between installation and implementation, so Changefirst

Assessment Help

For each question consider the extent to which you agree or disagree based on your personal opinions and feelings about change. Use the radio buttons to enter the appropriate score.

You must complete every question then click NEXT to submit your assessment.

Adapter Readiness Assessment - Example

Questionnaire

The questions below are designed to capture your view about the readiness for a change **within a group or individual**. Please consider a specific change that is being implemented in your organisation as the reference for this evaluation.

Each question should be answered from your personal viewpoint, based on your own opinions, knowledge, insights and feelings about the group or individual.

NOTE: This assessment can be used predictively by project teams or to gather views from those impacted.

All responses are confidential. No individual data will be reported to the organisation. All results will be represented as group data. We will not report data for any group containing less than 3 people.

For each question consider the following and enter the appropriate score.

When you think about the impact of the change on the Adapter group you believe that people...	Strongly Agree					Strongly Disagree						
	1	2	3	4	5	6	7	8	9	10	11	12
1. Understand the reasons why they must personally change.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Understand how the change will affect them.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Are willing to perform their jobs in the new way the change requires.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Have sufficient time and energy to absorb this change (along with current work load and other changes being implemented).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Have the skills and knowledge required by the change.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Can influence the content of the change as it affects them.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Understand the plan to implement the change.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Feel that the change fits with their beliefs about how work should be done.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Have sufficient time to learn the new ways of working (before their performance is assessed).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Will maintain or improve their working relationships.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Believe their job will be secure or enhanced after the change.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. Support the change vision and objectives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

NEXT

A questionnaire with radio buttons.

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run courses in their methodology and people can apply it to a real project as they learn, demonstrating both its effectiveness and their ability.

These courses were originally paper-based, but have developed, via CD ROM and web-based distribution of tool, tips and resources, into an online system that was launched last April. The company also offers workshops, webinars and coaching. I have reviewed this from a PM perspective, but as they say in their 'Right to reply' the methodology 'is designed for both expert and non-expert change agents and project managers'. So this review takes the perspective of a project manager who has the daunting task of taking a change project onboard and making it work.

Get started

Logging into e-change is via Changefirst's home page, using your email address and password. The first time you log in, you're asked for some personal details for identification and tracking purposes and you then choose your language (UK or US English, German or - later this year - Spanish).

You then go to the opening screen. This is your PCI portal, with access to 'Workshop pre-work', 'PCI Tools', 'PCI resources' and 'e-change'. I'll deal with the first three of these options later as I think it best to begin by looking at e-change. This online software tool guides you through PCI and makes the appropriate tools and resources available as and when required.

From the portal screen you select the 'e-change' button (you can also use a navigation menu on the left-hand side of the screen where a similar button's located: more about that later).

The welcome screen opens and you either enter a new project name or go to an existing project. This screen can feature the customer's logo and development is in progress to enable additional user customisation.

Having entered the name of your new project and hit 'Go', you arrive at the 'Wizard'

screen, which also includes a 'My e-change' area.

The first wizard, 'Introducing e-change', gives access to four tutorials that explain the e-change application and the PCI methodology - essential reading for new users. This wizard gives you the basic information, tells you what to expect, describes the PCI methodology and, says Changefirst, gives you the equivalent of a half-day's training workshop about the tool.

The remaining wizards take you, step-by-step, through managing a project using the PCI methodology.

The second wizard is 'Initiating your project'. There are four activities to be carried out (in order), a hints and tips podcast, and an 'Initiating e-change test' which is used while you're learning the process, to see how you're getting on. The tools supplied for use with the wizards fall into three categories: planning, interactive and diagnostic.

This second wizard focuses on four areas and each contains a tutorial that explains what needs to be done, step-by-step. Each tutorial is linked to one or more template documents that are completed at this stage. There are also links to worked examples.

Preparing the ground

At this stage you're attempting to understand the scope of the change and the readiness of your organization to receive it. You must start things moving and inform people about the change and what it's intended to achieve.

Next, a diagnostic questionnaire entitled 'Initiative Legacy Assessment' is completed. This helps assess the history of previous implementations in the recipient environment.

Using the 'Initial Change Description' template, which is available online and is also downloadable as a PDF file, you then prepare a document to describe why the changes are needed. Having given this document a name, you choose whether it will be personal or shared with a group. You open it and, into

a series of fields, type the reasons for the proposed change, the effects of its success and failure and the names of those responsible. In all, eleven questions detail every people-centred aspect of the proposed change - for example, what resistance to the change might be expected. This document can be saved and edited. Click 'Finish' and it appears in a list of your assessments.

At present, you can't customise any templates but Changefirst intends to make this functionality available. This important development is, I understand, due later this year.

You then put together a three-minute 'speech', the purpose of which is to provide a short description of the change that those promoting it can use to give a consistent description of what's going to happen.

The third stage, 'Planning your Project', involves building leadership support and developing plans that engage people in the change. There are seven tutorial activities, again with document templates etc.

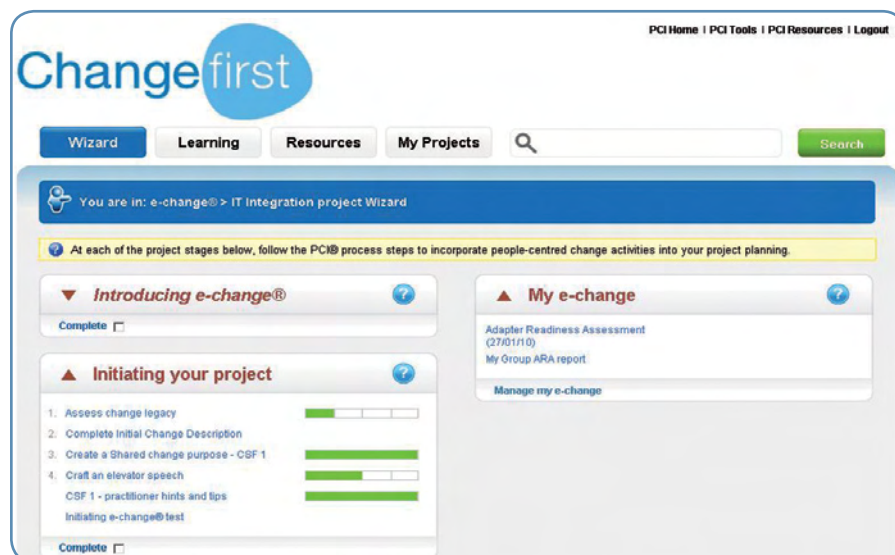
Sorting political issues

Three leadership roles are introduced: the sponsor, the informal influencer and the change agent. A process called 'Change Network Mapping' allows you to create a 'Change Structure'. This graphic is similar to an organizational chart. Starting at the bottom, you enter the people impacted by the change. Working upwards, step-by-step, you insert the managers and sponsors at each level. You then insert lines representing the formal management structure and then a second set of lines to indicate the lines of influence (eg, A is particularly friendly with B) so that in addition to being an organization chart is also shows the full extent of the political influences within the organization. A third set of lines outlining the project structure is then entered.

Having drawn the map you're in a position to analyse the true stakeholder picture and identify key individuals. You then use questionnaires such as the 'Sponsor Assessment' to work out how to best handle these people and how to get them actively to support the change. This is probably a good point to examine how such a questionnaire works.

The Sponsor Assessment document is a template document that collects your assessment of the group and individual sponsorship needed by the project. You prepare one of these forms for each of the people you need to sponsor your project.

You can invite other people to contribute and you enter their e-mail addresses. There's an editable covering message text that asks for their opinion on how to engage the sponsor and their past experience with them. The message can be e-mailed out, either from the PCI online domain (in the past some users have experienced spam-trap problems) or



e-change's 'Wizards' page.

Changefirst Build the Change Network Map

Assess the Network's readiness

Question: Which relationships must we develop or nurture for this change to succeed?

For all these individuals or relationships answer the following questions.

- What communication and preparation do they need?
- What involvement or joint working will they have?
- What training support do they need?
- How will the formal project structure be configured?

TIP: Go to PCI Resources, PCI Practice Zone for an example to practise your change network mapping and assessment skills.

Select each number in turn.

1. Identify critical roles

2. Identify gaps

3. Identify key relationships

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The tutorial page explaining Change Network maps.

via a link to the organization's own e-mail system.

Click 'Finish' and this document also appears in your assessment list.

Until someone replies, there are red crosses against each entry in the list of recipients. As people reply their red cross changes to a green tick.

If the respondent completes the questionnaire online, their answers remain anonymous. People who don't have email access can be sent a printed copy of the questionnaire for manual completion and their answers later entered into the system.

The questionnaire asks a series of twelve questions. They are based on fifteen years experience and field research and have been benchmarked with industry questions in the same areas. You agree or disagree with a statement in each question by clicking on a radio button to indicate a range of response from one to six. This causes a score to be calculated. Once three or more people have responded, a group average score is calculated.

Your assessment list will now show the number of responses and the average across all their scores. You can open a bar chart and a spider graph that illustrate the average mark across each question.

Changefirst's question database also holds a record of the recommended action in the case of high/low/average marks scored for each question. The scores are translated into a PDF report that uses this action set to make recommendations about how the sponsor should be handled. You can accept this report or you can edit it. This may be done after a group questionnaire follow-up meeting, when it may be decided to amend the plan.

Returning to the 'Planning your Project' wizard, 'Adapter Readiness' assessment is then done to gauge how ready those affected by the change are to accept it.

You then develop ways to involve, train, communicate and reward everyone shown

on the map. Planning templates and worked examples are provided for this purpose.

Preparing for delivery

At the fourth stage, 'Executing Project Stages', your focus is on building local business readiness and commitment for the change. In this stage you prepare the local managers to be ready to accept and drive the change through their local area.

Firstly, by using a questionnaire, or face-to-face conversation, you assess how ready each manager is to accept the change. You then develop them as sponsors, asking them to behave in particular ways, giving them tactics to use within their teams to both build local commitment to the change and to handle resistance as and when it occurs.

At the fifth stage, 'Controlling Project Stages', you refine and execute your people change plans. You also track commitment levels, behaviour changes, update and report on new project risks and make mid-course changes to implementation plans if they're needed.

At this stage you're measuring the progress against your plans, especially in the levels of people's commitment, and PCI provides an 'Initiative Risk Assessment' diagnostic questionnaire to enable you to update and report on new project risks and make mid-course changes to the people areas of the plans. Tools are provided to enable you to convert planned actions into realities.

The sixth stage involves 'Closing the Project' and collecting information - lessons learned, benefits realised and success in using the PCI methodology - all from the people perspective.

Video and text-based learning

Whenever you launch a tutorial, e-change moves from its 'Wizard' mode to its 'Learning' mode. Your view switches to a text-based learning package that opens in its own window. You click your way through the

pages presented to you, reading what you find there.

Some modules contain text with voice-over, in others, video's been added. All the videos involve one of Changefirst's trainers delivering a face-to-face session. It's planned to include more video.

Against each activity at each stage there's a progress bar which is drawn as you complete that activity. Once you've finished a wizard you can tick a checkbox to collapse the wizard to a single line. You might want to check how much you remembered when you've completed a session and at this point you'd use the test.

Changefirst is working on an online accreditation module and the results of these tests will be tracked as well as your progress through the modules (and how many times you repeat a wizard) and will be used for accreditation purposes.

Each test contains between six and ten multi-choice questions - each having three or four possible answers. If you get the right answer, you move to the next question. If you get it wrong you're told this and get another go. You can repeat this process until you get the answer right. By the time you finish the test you should have a 100% score and, hopefully, a better understanding of those areas you're weakest in so that you can return to redo those parts of the tutorial - but the system doesn't force this upon you.

Another way of accessing a tutorial is to click the 'Learning' tab. On the resulting screen all the tutorials are listed, either in order of completion or in alphabetical order (your choice). You can then select one from the list or work through them in order. You can also search for any tutorial containing a keyword or phrase in the title (but not in the text).

There are twenty-three tutorials, five tests and six sets of tips and tricks.

Further help

Behind a tab labelled 'Resources' is a set of fact sheets, extra reading, white papers and plan templates which, as they're unlikely to be put to frequent use, have been stored here for ease of access. Among the interactive tools found here are an Excel template Gantt chart and a Microsoft Project template. These can be downloaded to be worked on and saved locally. They can also be uploaded back to e-change where they'll be stored in the portal screen 'My e-change' area, maybe for security purposes or maybe to share with the group.

Development work on the 'My e-change' area continues and Changefirst is investigating how e-change will integrate with other collaborative tools that their customers may be using. It's also intended that files stored in this area should be shared with the group and should be single-click viewable (provided that the originating application is available on their machine).

You can also have a link to an internal or external web site embedded in your 'My e-change' area. You can customise this area, adding folders (categories) and sorting the stored files into them. You can add files, either copies of the files or links to them, at your discretion. At present there's no limit on the amount of storage capacity available to clients, but this may change.

The full contents of 'My e-change' are available to you across all of your projects, thus enabling you to copy documents between them.

Whilst e-change can be purchased as a standalone solution, Changefirst also offers it as part of a training package that involves some workshop sessions and post-installation support. In preparation for the workshops it may be necessary to do some preparatory work, completing questionnaires, doing reading, etc. and this is available via the Workshop Pre-work portal option.

On the left-hand side of the portal screen is a navigation menu which contains access to all the tools and resources. Once you're happy that you know the method, and no longer require the learning modules (although they remain available as refreshers), all the tools and resources can be accessed by this menu.

A video tour of the product plus a free fourteen-day trial are available from the Changefirst's Web site.

How much does it cost?

The price is £899 (exc.VAT).

For this you get:

- More than eight hours of practical learning
- Four change planning tools
- Twelve change implementation tools
- More than twenty change planning templates
- A selection of best practice examples
- Some sample plans

And unlimited access to Changefirst's range of best practice guides.

Right to Reply

Thanks to Steve for his accurate review of e-change.

Our mission has always been to help organizations and individuals implement change successfully, and our new product is an extension of this ethos. e-change is fifteen years of change management expertise packaged into an online suite of tools, resources, processes and learning, and is designed for both expert and non-expert change agents and project managers. It can quickly help people plan, implement and track the change management components of a project through a process that covers initiating, planning, executing,

controlling and closing. As it is an online and on-demand solution, e-change gives users a low-cost and resourceful way of managing the people side of change.

The e-change roadmap for 2010/11 will look into increasing the ability to collaborate more effectively through e-change; and to deliver a full online accreditation programme for the PCI methodology.

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