



The Importance of a Strategic Change Management Plan

by: Acquis Consulting Group



Most people don't like change. In fact, they dread it. Why? Because by nature we are creatures of habit, and change brings about something new, different, and uncertain. Change, especially in business, takes us away from what we're used to, disrupts the normal rhythms of our days, and makes us uncomfortable. But managing change effectively is not difficult and can go a long way towards ensuring that change-ups such as a new system implementation, a recent merger, a process alteration, or a new CEO, are successful.

The term "change management" essentially refers to shifting a person, a team, or an entire company from the as-is, or current state, to the to-be, or future state. A change management strategy is inclusive of the focused training and communication activities necessary to affect change across an organization. The strategy should be built taking into consideration a company's culture, values, and political landscapes at a high level, and individual roles and responsibilities and the environments in which they operate at a more micro level.

With systems implementations such as Concur Travel & Expense, a change management strategy is key to help employees understand what to expect and what is required of them. It establishes a roadmap and reassures employees that the organization is committed to, and, more importantly, prepared for the change. The following are some key questions to consider and best practices to follow when developing a change management strategy.

1. Who should be involved in developing a change management strategy?

It's important to have a change management lead who can own and drive the overall process. Sometimes that person is part of the internal corporate communications team, but if not, project communications should be carefully coordinated with the corporate team to ensure that all requisite processes and procedures are followed appropriately. Executive involvement and buy-in is essential because during change, people will look to their leaders for guidance, support, direction, and continued commitment to the change.

Driving change is the responsibility of all individuals involved in the project, including sponsors and individual team members. The effort and tools to manage change should be tactically centralized with the project team, but it is crucial for team members to champion these changes and be cognizant of change acceptance obstacles.

An effective change management strategy will take into consideration all required approvals and any statutory content (e.g., data privacy, European Works Councils) that must be included in communications.

2. Who is the audience for change management activities?

The target audience for change management activities around a system implementation is generally broken-down into two main segments: the internal project team (e.g., project sponsors, project managers, regional leads, technical leads), and the external organization (e.g., those impacted by the change).

With the internal project team, change management (mainly communications), is fulfilled with recurring project status meetings, sponsor status reporting, coordination with PMO communications, and ad hoc status updates. Those impacted across the external organization should be identified by thinking through relevant processes and cataloguing who is affected (e.g., office employees, sales force, administrative assistants). If it's a global project, market differences have to be considered when identifying target audiences and differentiating target messages.

3. What type of materials/channels will I be available to leverage?

A detailed assessment of available training and communication channels is a first step in change management planning. A change impact analysis is also valuable for detailing the changes that will result and identifying ways to address those changes.

Various channels can be utilized to distribute project messages and raise awareness including in-person meetings (town halls, brown bag sessions), email communications, intranet updates, and e-signs throughout company buildings. Similarly, training can be delivered across various mediums including web-based and in-person. Audience access, corporate culture, budget, message importance, immediacy, and potential need for interactive communication (e.g., asking questions) should be considered when selecting channels.

As part of its standard deployment toolkit, Concur provides access to a vast amount of change management material, including:

- [Change management activities guide](#)
- [Training videos](#)
- [Sample deployment emails](#)

Additional change management material from Concur can be found here:

http://www.concurtraining.com/prdeployment/cte/deployment_and_transition

4. When does it make sense to customize?

Whether to customize a change management plan can depend on a variety of factors, including:

- Number of countries involved,
- Complexity of requirements (for systems implementations),
- Major differences between business units,
- Corporate culture (i.e., what's the norm),
- Budget, and
- Company size

Generally speaking, the more countries or different business units involved, the greater the complexity around requirements, and the more it makes sense to customize via tailored messages, translated material, and specific information. Depending on budget and team size, it may make more sense to have the local countries manage the customization rather than the centralized team.

5. Preparing for a global implementation: Benefits of a change management toolkit

With global implementations it often makes sense to create a change management toolkit that includes project material such as:

- Project overview: project drivers, timeline, deployment schedule
- Overview of project communication and training material
 - Release schedule
 - Customization guidelines
- Embedded communication documents
- FAQs

The benefits to creating a toolkit include maintaining consistency, using approved material, and streamlining the process. And, if there isn't an internal team to customize the materials, this is an effective way to provide guidelines but allow the markets to make the changes themselves.

6. What are some key change management success metrics?

As with any initiative, it's important to measure how successful the effort was. With change management around a Concur implementation, some success metrics to consider are (percentages to be determined by individual organizations):

- Post launch survey satisfaction at X%
- X% increase in calls to help desk
- Percent of employee adoption
- On time launches
- Ease of use with new system
- Time it takes to complete the travel and expense
- Time it takes to process expense reports by back office staff
- Number of expense reports processed over a standard time (day, week)

There are a lot of factors to consider when planning for change in an organization. However, the most important step in the process is to develop a change management strategy early and to identify the right level of complexity for your organization.

About the Author



Stephanie Vallet-Sandre is a Principal at Acquis with more than 20 years of business experience in diverse roles, including marketing management, brand strategy consulting, and management consulting. Over the past 12 years at Acquis, Stephanie has partnered with clients to design strategies and put them to work across many of Acquis's Services and Expertise including Change Management, Corporate Travel, and Program & Project Management. She has lead global change management strategy initiatives for Concur travel and expense management system implementations.

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