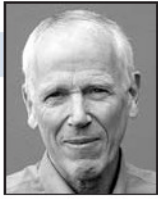


Make a Case for Change

Build engagement and support.



by Richard Bevan

AT THE HEART OF many change processes is a conflict.

The reason for major change—a merger, reorganization, or launch of a CRM system—is often complex, understood by only a few executives. Yet a solid grasp of the reasons for change, and the process for implementation, is a key in building buy-in and support.

Change initiatives often stumble and fail because the purpose and process are not understood and accepted by the stakeholders—those people most affected by the change, and able to influence the outcome.

When we distill complexity into a clear, concise statement, leaders often assert that a brief summary is unrealistic. “It’s far too complex,” they protest. “You can’t reduce this to a few sound bites.” But if it’s not reduced to a few key points, audiences will draw their own conclusions. Unable or unwilling to listen to or study a long and complex story, they will instead rely on hearsay and their own assumptions.

In planning and executing a change effort, leaders need to be clear and concise about purpose, direction, and approach. An effective *summary document* helps explain *what’s changing and why, how it will happen, and who will be involved*, as it describes the context, purpose, and plans; and links the change to broader business needs.

When creating your *summary document*, aim to be persuasive and informative—present the facts but also highlight benefits. Identify objections and respond to them. Here are a few examples of *persuasive responses* in discussing factors that drive change.

- **Technological developments:** Describe why change is needed, and how the organization will benefit.
- **Growth opportunities:** Identify ways that employees can advance.
- **Burning platform**—an issue that compels action: Describe the circumstances that make change imperative. Be candid about *consequences of failure*.
- **Competitive activity**—a challenge to match, or chance to win: Cite facts about strengths or weaknesses in the

competition; emphasize why the organization needs to change to get ahead.

- **Customer input**—what customers want and need: Customers state *unmet needs* that a competitor might exploit.

Deploying a business case supports the change process in four ways:

- It drives consistent messaging.
- It exercises a *forcing function*—early in the planning—through which people verify that the case for change is clear, complete, and appropriate.
- It ensures that the purpose and process for the change are clearly defined and builds trust in the process.
- It helps leaders communicate effectively and tell a compelling story.

Communication gives meaning to purpose or vision. Delivering a clear message about *purpose* and *direction*—supported by discussion, clarification and engagement-building—is the key



task of the leader of a major change.

The business case needs to address several questions and concerns. Those involved in change need to see why it’s happening, how it will affect them, and how they can contribute:

- **What’s this all about?** Present the story behind the change and the facts about plans and process for execution.
- **How will this affect me?** Outline the impact on major groups and teams, and ensure that managers are equipped to respond to individual questions.
- **Why are we doing this?** Outline the rationale for the change.
- **What will be different?** Describe the *intended outcome*; paint a vision of the future that makes sense to all involved.
- **What’s the value?** Outline the benefits and opportunities for employees, customers, and other stakeholders.
- **How will it affect our bottom line?** Discuss the *expected impact* on the business.
- **Where can I get answers?** Ensure that people can find answers in materials

they receive, on an internal web page, through managers or other sources.

Customize and interpret messages as appropriate for different audiences. Address the interests, needs, and concerns of each group.

Deploying the Case

When you have a clear story about the change initiative, you need to ensure that it’s effectively *distributed, supported, and kept under active review*.

Distribution. Distribute the material to change sponsors, seek feedback, and integrate their comments and ideas. Ask them to use the case as a primary source when preparing presentations and materials relating to the change.

Create a snapshot version—an elevator pitch or three-point summary—and distribute it to managers and others involved. Encourage them to adapt the pitch to local issues and use it with their teams. Post it on an internal Web page. Post an *online resource page* that includes the latest version and an evolving FAQ. Include a field for questions, and a section where people can share ideas and experiences.

Distribute to those who interact with external stakeholders—to those who manage communication with customers, external media, and shareholders—and encourage them to share with you the materials they develop.

Support. Create collateral to support and extend the summary: FAQ guides with answers—perhaps in versions for employees, managers, and functional areas. Prepare a PowerPoint deck for use in briefing and planning meetings. Adapt and update the material as the change develops and as issues and priorities change. Ensure everyone is referencing the most recent and relevant version. Mention the *resource* in internal communications. Ask leaders to reference the document in their meetings and to encourage its use by others.

Encourage feedback to strengthen the case. Welcome input to help strengthen it. Seek feedback (perhaps using an online survey) after the material has been in use for a few weeks.

Review and maintenance. Stay connected to your team. Review changes and additions to the *summary document*. Hold follow-up meetings (live or via conference call) to evaluate developments, track progress, plan responses, and amend and update as *indicated*. A robust *business case summary* will help you *manage change* successfully. LE

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ACTION: Create and use a summary document.