'Change

HOW TO HELP
EMPLOYEES
EMBRACE CHANGE

communication
made easy

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DAVIS
& COMPANY

About the author

David Pitre leads Davis & Company's consulting team, which provides clients with support in employee communication and change management. Since joining the firm in 2005, David has helped leading organizations—such as BlackRock, Dun & Bradstreet, New York Public Library, PepsiCo and The Rockefeller Foundation—reach, engage and motivate their employees. As the firm's measurement practice leader, he developed Davis & Company's communication effectiveness model that helps clients demonstrate the value of their work. An experienced speaker on communication issues, David has conducted workshops for The Conference Board, the International Association of Business Communicators, Society for Human Resource Management and the Institute of Communications and Advertising. He holds a bachelor's degree in instructional media from Ryerson University (Toronto) and an MBA in design management from the University of Westminster (U.K.).

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Introduction

We have a change problem

You don't have to travel far to understand that change is tough. Every change initiative comes with roadblocks and unexpected turns. According to Nitin Nohria and Michael Beer *(Harvard Business Review)*, more than 70% of internal change initiatives fail to meet expectations.

In our role as change communication experts, my colleagues at Davis & Company and I have witnessed far too many change efforts that stall, sputter or just fail. So what happens? Why do professionals with good intentions let change initiatives go off the road? Here are five common potholes:

1. **Lack of senior leader commitment.** When a pharmaceutical company introduced a new process to improve accountability and decision-making, leaders didn't demonstrate the new behaviors. Instead, they acted as familiar bottlenecks: "I want to review this first." "I'll get back to you with my decision." "Let's chat after I've had a chance to review." While employees liked the new process, they weren't given permission to act differently. The effort failed not only because leaders didn't walk the talk, but also because the communication team didn't work with leaders to get them on board.

2. **Resistance from key leaders or managers.** A cross-functional team at a major retail chain was charged with creating a new IT infrastructure to manage ordering, inventory and customer systems. Senior leaders were committed but district managers preferred the system they knew, so they subverted the change. The new system was eventually implemented, but it happened slowly, painfully and not as extensively as envisioned.

3. **Too soon, too vague.** The U.S. division of a building products company planned to implement a new Enterprise Resource Planning (ERP) system over two years. Initiative leaders wanted to make sure everyone knew about the program, so

they immediately launched an extensive communication campaign. This made employees anxious because they didn't know how change would affect them. And by the time the system was introduced, employees suffered from change fatigue.

4. **A positive spin.** To remain competitive, a pharmaceutical company needed to improve efficiency and reduce costs. The CEO introduced an "exciting new initiative" designed to position the company for the future. Few details were available at the beginning—just concepts. But as changes were defined, it was clear the initiative was mostly about cost cutting (including eliminating jobs). Since cost cutting didn't align with anyone's definition of exciting, employees quickly grew cynical.

5. **Moving on before the job is done.** A diversified healthcare company launched an effort to transform culture and operations, including Mission/Vision/Values (MVV) and seven broad process initiatives. The MVV team was first out of the gate and delivered a change program that exceeded expectations. But most other initiatives stalled or faltered, as leaders moved on to other priorities. Fast forward one year and most employees thought the change, called "Transformation," was about values.

What's the best way to fill these potholes? See the last chapter, , to understand how the advice shared across my six-step change communication process can be applied to these challenges.

Here's the good news

Communication can make a difference. Our work with organizations—large and small—has shaped our core change communication philosophy: **create an immersive experience that engages employees.** In other words, don't simply tell them what's changing and expect new behaviors; involve employees in the process of shaping the change and making it a reality.

Take a trip with me as I explain my six-step process designed to help you navigate roadblocks and make change stick in your organization:

1. Get stakeholders on board
2. Develop your plan
3. Drive awareness
4. Build deep knowledge
5. Measure frequently
6. Reinforce new behaviors

My goal is to help you fix change communication potholes before they become big problems!
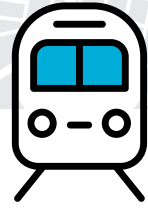
Get stakeholders on board

**In this chapter,
you'll learn how to:**

✓Create a broad picture of the change, including employees' perspectives

✓Build a story that succinctly summarizes background, the end goal and the plan to get there

✓Ensure leaders and key stakeholders are aligned before communication begins

After several weeks, or sometimes months, a planning team emerges from a closed-door room to announce, "We're done. And we're ready to talk about the change. Hit the send button!"

Sound familiar? While members of this team may be fully committed, other stakeholders (including leaders) need to understand the change before it is introduced to the entire organization.

Let's review the core tactics to get there:
• Investigate the change
• Articulate the story
• Ensure stakeholders agree on scope and details

Investigate the change

Ask lots of (tough) questions. You're called to a VP's office to discuss a new change initiative. After making you wait for five minutes, he calls you in and hands you a 36-page presentation. Do you:

A. Take the presentation back to your desk and scour it for details?

B. Start asking questions to uncover the essential facts you'll need to communicate?

The right answer, of course, is B. No 36-page presentation will ever yield more useful information than a conversation where you can ask such essential questions as:

To uncover:	Ask:
Purpose/vision	• Why are we launching this initiative now? • What prompted this project initially? • How will we measure success?
Target audience	• Will this initiative impact employees at all levels? • Does this affect both HQ and manufacturing staff?
Scope of change	• What will this change mean for our business and employees? • What types of new processes will be implemented?
Areas of impact	• Will this be a global initiative? • Will these changes be implemented consistently across the business?
Timing of change	• Will this be a phased initiative? • How close are we to launch?
Specific areas of change	• How will this initiative affect the way employees do their jobs? • What do employees need to do differently in order for this initiative to succeed?

Conduct preliminary research. What do employees know about the change? How do they currently behave? What questions will they have when the change launches? Depending on whether you can share the details of the change in advance, you can conduct focus groups to determine answers to these questions. One-on-one interviews are another option if the topic is complex or challenging.

Test scenarios. At your last visit to the optometrist, she probably asked, "What's better: A or B?" Use the same strategy with employees to help the change team make decisions, so you're ready to communicate the details of a change.

💡When the HR team at a consumer goods company wanted to formalize its talent mobility policy (moving employees around the world), we tested scenarios with employees. For example, we asked, "What's better for the first visit to your new location: two first-class plane tickets or a set travel budget?"

Articulate the story

When a change is launched, employees want to know what is happening now, what will happen—and most importantly—what the change means for them:
- How did we decide to make this change? Why is it important? **(context)**
- How will we know when the change is done? How is this different from what we're doing now? **(vision)**
- How will we make this change? **(plan)**

A story, or set of key messages, helps you curate critical information and clearly explain the situation. It will help those who have communication responsibilities deliver consistent messages and focus on the right topics. And it will help employees navigate the details—from project teams to focus areas—that are challenging to remember and prioritize.

The power of stories

Why stories? Because they stick!

Most of the information we consume washes over us, but stories capture our attention.

They help us learn by creating memorable moments. They allow us to try on new behaviors without risk. And they encourage conversation—a key component of knowledge building.

Here's a simple process to develop your organization's change story:
Start your narrative by using a story arc, which the *Oxford English Dictionary* defines as the development or resolution of a narrative or principle theme. An arc maps the key points of your story in a compelling way—and creates a consistent framework for leaders (and everyone else) to communicate the change.

To illustrate, here is the story arc for a cherished children's tale:
- **Exposition:** Cinderella lives with her wicked stepmother and stepsisters.
- **Rising action:** She meets her fairy godmother who uses magic to make Cinderella a beautiful dress for the prince's ball.
- **Climax:** Cinderella dances with the prince and loses her slipper while desperately trying to get home before the clock strikes midnight.
- **Falling action:** The prince takes the slipper to every maiden in the land. But the slipper only fits Cinderella's foot.
- **Resolution:** The prince and Cinderella live happily ever after.

The same story principles can be applied when communicating change to employees, such as rolling out a new strategy:

- **Exposition:** The company is founded and built upon an important mission.
- **Rising action:** The company delivers a solution and helps solve an unmet need.
- **Climax:** The company grows too fast and is not sustainable.
- **Falling action:** The company develops a plan for the future that will set it up for long-term success.
- **Resolution:** Customers, employees and the company win.

Once your story arc is set, fill in the details. This step can take many forms, such as creating a two- or three-paragraph story. Or try an approach that's more visual: a top-level elevator speech (one sentence) supported by three key messages that get into the details of the change.

Now you're ready to leverage your messaging or story consistently across communication channels: leader forums, newsletters, the intranet, and even posters and other workplace tactics. By creating a balanced message that focuses on what employees need to know, you'll build a strong foundation to engage employees in a change.

💡 When several support functions at a large pharmaceutical company were centralized into one services organization, we created a core deck for leaders that explained the story: history and successes before the change, the vision for the new group and next steps.

Ensure stakeholders agree on scope and details

If you worked on a big change project in the past, you likely heard stakeholders say:
- "This doesn't apply to us."
- "I don't agree with the approach."
- "We're too busy."

Don't let leaders and other key stakeholders be barriers to change. Take the time to build knowledge and acceptance of the change, so they're ready to support it.

How do I encourage leader agreement?

A shared experience, such as an in-person workshop, is the ideal way to build agreement. The workshop should be designed to:

• Build knowledge of the change

• Decide on high-level milestones and metrics

• Identify risks

• Involve leaders in developing parts of the communication plan; for example, which tactics would work in their organizations

• Test key communication pieces, such as the change story

• Answer questions

Ensure stakeholders truly understand the change. Often VPs and unit leaders know what's changing in their own areas, but don't understand the full extent of organization-wide implications. Make sure key stakeholders have an opportunity to learn what's changing, where and when.

Give stakeholders a chance to internalize the change. Those in leadership positions are people too, so they feel the same anxiety and uncertainty employees do. As you're onboarding stakeholders, include opportunities for them to ask questions and express concerns.

Agree on communication principles. These are beliefs about how communication should happen within your organization, which set the stage for the rest of the planning process. Principles shape your strategies and demonstrate the rationale for proposing certain tactics. And principles are a good way to keep leaders on track if communication starts to sputter.

Here are a few examples of communication principles:

• We're transparent about decisions.

• We communicate first to employees who are significantly affected by an event/change.

• If we don't know the whole story or can't share it, we tell employees what we can and let them know when they'll hear more.

• Dialogue is our first choice for communication.

Develop your plan

In this chapter, we'll review the essentials of a strong change communication plan. You'll learn how to:

✓ Segment your audience

✓ Select tactics

✓ Articulate communication roles for leaders and managers

The details of change initiatives are sometimes squishy. Teams often need to work through their processes before decisions are made. And decisions may take time because of dependencies.

A communication plan is the perfect way to manage that ambiguity. Consider it a playbook for managing the communication process as decisions are made.

The best change communication plans help the change team think proactively, define success and prioritize the organization's efforts. Be sure your plan covers all the bases:

• **Answer the question: Where are we now?** Create a situation analysis to set context and get everyone on the same page.

• **Define key audiences.** Be as specific as possible to describe important segments. See Segment employees by impact and set objectives.

• **Set communication objectives.** The best objectives are specific, actionable and measurable. They describe a desired outcome—and a commitment. And they always

support the change project objectives. Check out the example in the next section, Segment employees by impact and set objectives, if you need inspiration to develop solid objectives.

- **Create key messages.** Targeted messages ensure that employees get consistent and focused information.

- **Develop a mix of strategies.** This is the *how* of your plan, which outlines your approach to reach your objectives.

- **Describe tactics in detail.** Especially when proposing something new, make sure you provide enough color and texture, so stakeholders can understand what you mean.

- **Include a timeline.** Map how and when your communication program works to create a complete picture.

Once your plan is complete, create a one-page summary to help stakeholders quickly see the big picture.

Segment employees by impact and set objectives

Segmentation—dividing your target audience into groups—is your secret weapon to ensure employees are engaged, so change sticks. This technique will help you move from communication that is high level (and ignored by most employees) to information that is specific and helpful.

Here's how to segment:

1. **Map groups.** After you have interviewed owners of the change, identify key groups that will be impacted. Keep in mind that some groups may only be somewhat affected—needing only to understand what's happening around them—while others may be required to change how they work. If your organization has a project or change management function, leverage that team's stakeholder analysis.

2. **Identify what each group is required to know and do.** Now consider what needs to happen for the change to be successful. Focus on what each group needs to do differently. Be as specific as possible.

3. **Consider subgroups.** As you add the impact for each group, you may discover that subgroups are required. For example, you may have included "managers" as you mapped impacted groups. But now that you have a better picture of impact, you decide it's better to break that group into two: "people managers" and "other managers."

Here's an example of how one company segmented employees for a communication plan designed to launch a new web-based performance management system:

Group	Communication objectives
Senior leaders	• Understand the new process • Lead by example: use the system to provide feedback
Assistants to senior leaders	• Understand the new process • Understand leader's role and flag when participation is required
HR professionals	• Understand the new process • Train people managers to use the system • Know how to run reports
People managers	• Understand the new process • Use the system to create a plan and approve the plans of direct reports • Know how to run reports
Employees	• Understand the new process • Use the system to create a plan and enter updates

Select existing tactics and create new ones

Now you're ready to identify communication tactics that will help each group learn about the change and understand what to do. Consider tactics that will build awareness (such as posters and email), as well as knowledge-building tools (such as workshops and Q&A sessions).

Leverage existing channels. You likely have a set of communication tools that you use regularly, such as the intranet, an email from the CEO or a newsletter. Put those channels to work in your change communication plan. For example, a special section on the intranet could be a helpful place for employees to get the latest information on the change.

Consider new communication tools. From one-page overviews to meetings and workshops, new or one-off tactics will be an important part of your plan. They will help you build knowledge within specific groups and help key stakeholders play their communication roles.

Mix it up. Don't fall into the trap of sending an email and considering communication complete. When it comes to change communication, the most critical tools encourage dialogue and participation.

Decide on the goal for each communication deliverable—from awareness to deep knowledge—and select tactics accordingly:

	Communication goal: Create awareness $\longrightarrow$ Build deep knowledge		
Sample tactics	• Poster • Intranet articles, blog entries or leader videos • Email	• Overview map • FAQs • Dedicated microsite • Detailed brochures • Manager or leader toolkit • Web-based training or how-to videos	• Leadership summit • Small and large group meetings with leaders • Advocates/champions • In-person training
Examples when these tactics are used	• Reinforce the vision or priorities • Share a key date • Demonstrate progress	• Explain key components of a change • Share details behind decisions • Provide opportunities for self-directed learning • Answer questions	• Build buy-in • Gather input and feedback • Practice a new process • Answer questions

Define communication roles

When change hits, leaders and managers often avoid tough conversations. Here are the top reasons they're reluctant to take on a communication role:

• **Lack of knowledge:** they don't understand the topic well enough to present it, interpret it or answer questions about it.

• **Unclear expectations:** they don't know that communication is expected of them; that it's a key role.

• **No accountability:** they aren't held responsible for communicating.

• **Insufficient communication skills:** they aren't comfortable presenting information, answering questions or responding to concerns.

Setting expectations with leaders and managers is a fundamental way to address these challenges. Your first step is to define their communication roles, which typically include three core communication tasks:

1. Translate and create meaning by:
  • Restating key messages in ways employees can grasp. Minimize the use of *corporate speak* and use common words and relevant examples to ensure understanding.

  • Helping employees learn what the change means to them: how they need to do things differently, so company objectives are achieved.

- Turning *change* into actions by linking corporate goals to division/department and individual goals, so employees know what they need to do and at what performance level. Employees need to understand what is expected of them (actions and behaviors) in measurable terms.

2. Collect and provide feedback by asking how it's going and informing employees how they're doing as a group and individually. Encourage dialogue about progress and give employees opportunities to share their progress with others.

3. Answer questions by knowing how to respond when the answer is not yet known or can't be shared. And know what to say about rumors or when someone expresses anxiety.

Here's an example of how we typically define communication roles by level:

Position	Communication role	Why it's important
Senior leaders CEO and direct reports	Share the vision, clarify priorities, and share progress and accomplishments	Employees look to leaders to provide direction and focus.
Key leaders One to two levels down from senior leaders	Interpret the big picture to convey "what it means to us"	Abstract high-level information becomes concrete and meaningful.
Managers Directors, managers and supervisors	Define what employees need to do for the organization to succeed, answer questions and address concerns	Dialogue is the most important tool in communication. It allows employees to participate and helps them work through issues.

At a telecommunications company, the CEO brought VPs together to provide an overview of an upcoming organizational change and emphasize the importance of meeting with employees in their areas. Following the in-depth session, VPs were then provided with a leader guide that further articulated their role and gave them essential tools, including key messages and frequently asked questions.

Drive awareness

**In this chapter,
you'll learn how to:**

✓ Create a mental image of the change that is easy for employees to grasp

✓ Decide when to start the communication process

✓ Demonstrate that your change is important, not a flavor-of-the-month initiative

There's more to driving awareness than simply announcing a change. It includes keeping the change top of mind, so leaders don't move on to the next thing and employees are committed to making change happen.

There are three critical elements to ensure you drive awareness—the first goal when you start communicating about change:

• Make the change tangible
• Get the timing right
• Demonstrate that change is a priority

Make the change tangible

Remember the story you worked on during Step 1: <u>Articulate the story</u>? That was high-level, big picture work. Now it's time to bring the story to life across the communication channels you selected as part of your plan. Here are a few tips:

Be specific. When leaders describe a vision for the future, they tend to use abstract words. According to research conducted by Andrew Carton and Brian Lucas *(Academy*

of Management Journal), leaders are three to 15 times more likely to use conceptual language (such as, "changing the world") over focused, image-based phrases. President Kennedy's *moon* speech (1962) is an example of the power of being specific, "We choose to go to the moon in this decade…" It helped a nation see the possibility.

Develop a picture. There are many techniques to help employees visualize the future and imagine their roles in it. But one of my favorites is developing an infographic that illustrates the change and what it takes to get there. Think of a mall map. It helps you understand where you are while getting the big picture. These visualizations can also serve as guides for one-on-one or team discussions.

Use comparisons. When a payment technology company went public, we compared its journey to the transformation of other well-known companies. When you imagine IBM moving from computer manufacturer to technology and consulting services, it's easier to grasp the complexity of such a change.

	From	To
IBM	A computer manufacturer	Technology and consulting services
Disney	Animated characters/films	An entertainment organization
Starbucks	A coffee house	A lifestyle experience/gathering place

A core strategy to make change tangible: shrink it

In their book, *Switch, How to Change Things When Change is Hard,* the Heath brothers use the term "shrink the change" to describe helping those going through change to see it as manageable and doable, instead of a big brick wall.

There are two lessons we can leverage for change communication planning:
• Make the change familiar
• Break it down

Make the change familiar. With most change, there's an element that has been worked out before communication starts or a similar effort has been completed in the past. Chip and Dan Heath write, "Rather than focusing solely on what's new and different about the change to come, make an effort to remind people what's already been conquered."

For example, a vast organizational change may reference improvements made earlier at a specific division: the benefits, how the effort was organized, lessons the team learned and how it inspired bigger change. Or, when a new accounting platform is introduced, it can be compared with the HR system that was built two years ago. The Heaths call this "lowering the bar;" that is, we've done this before and we can do it again.

Break it down. You may have used this method in your personal life without realizing it. Remember the last time you prepared a meal for a large group? You probably broke down that big job into smaller, manageable tasks: from creating the grocery list to shopping for ingredients to prepping the day before. And you assigned several tasks: "You bring appetizers," and "You're in charge of dessert!" Each task on its own feels manageable, but put them together and your progress is easy to track and you end up with a big accomplishment.

As the Heath brothers write, "Small targets lead to small victories, and small victories can often trigger a positive spiral of behavior."

Get the timing right

Up to now, you've checked a lot of boxes: You defined the change, articulated the story, got leaders on board and developed a communication plan. Now you're ready to share the change with everyone. When do you hit the send button?

I don't have a hard-and-fast rule for timing communication, especially the launch of a long change campaign. The risk is that if you communicate too soon, you train employees to ignore your messages: "That's not happening until the end of the year. I'll worry about it later." But if you share information too late, you may cause stress: "I don't have enough time!"

Instead, for each change or situation, I work at managing the right balance. Give employees enough time to understand a change is coming, so they can get used to it—one to two weeks seems to be the sweet spot. For example, "Enrollment starts next week." But I also like to be as *just in time* as possible, so employees have the

information right before they need to take action. And finally, I'm a big fan of friendly reminders: short messages that don't overwhelm or annoy, but give a gentle push.

The trick of timing is in the details. If I'm not able to answer basic questions that employees will have immediately—such as "What do I need to do?" or "What does this mean to me?"—I like to wait until there's a timeline for answers to these questions.

Demonstrate that change is a priority

Leaders signal a topic is important when they make time to talk about it, such as during a meeting or in an email. Ensure your key messages get plenty of airtime. Here's how:

Repurpose perspectives for a microblog. Leaders have no shortage of thoughts and opinions. The key is to capture what they say—in both internal and external venues—and repackage it into 25- to 50-word observations. Just like that, you've got microblog entries such as these:
• "I am currently working on an exciting project. Here's where I need your help."
• "I was recently at a conference and learned something new that applies to our change."

Capture quotable quotes. Whenever your leader says something meaningful and memorable (even if you helped shape it), collect those quotes. Then create sidebars or callouts for an e-newsletter or intranet news page.

Create podcasts. Your senior leader was just interviewed on a TV program or made a speech. Use the audio portion to create a podcast to post on the intranet. Employees can listen to short segments on their computers and download longer versions to play later.

Share Qs and As. Every time an employee asks a question and a leader answers it, great content is created. But what happens at a town hall doesn't have to stay at the town hall. Instead, record the Qs and As, and edit them to post on your social media platform.

Upcycle presentation slides. After a leader presents at a town hall or other forum, curate the best PowerPoint slides and create topic-specific slideshows. Did the leader talk about a timeline for the change? One of the priorities? A recent win? Each can become a separate slide module.

Give photos the Instagram treatment. Got a smartphone with a camera? Of course you do! Take candids (but not selfies) of the leader interacting with employees, whether he/she is visiting a site, holding a small group meeting or simply walking around. Write a quick caption and you've got great material for any channel.

Vine-ify video clips. Remember Vine—the very short-format (six seconds) video hosting platform? While you'll probably need more than six seconds, use the spirit of Vine to edit existing video footage into very short segments. The key is to make them topic-specific and quick to watch.
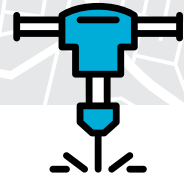
Build deep knowledge

In this chapter, you'll learn how to move from creating awareness and basic understanding to building insight and expertise (deep knowledge) by:

✓ Activating leaders and managers

✓ Embedding interactions into your communication tactics

✓ Using the power of questions

If you want employees to do something differently, an email won't cut it. Deep knowledge inspires action and commitment. Imagine an employee saying, "I can answer questions about this topic." Or, "I know what to do." That's deep knowledge.

The challenge is that building deep knowledge requires time and an expanded set of tactics. Here's how to get there:
• Help leaders and managers fulfill their communication roles
• Include high-touch experiences
• Focus on questions

Help leaders and managers fulfill their communication roles

After a financial institution announced it was merging with another bank, the bank's VPs and directors stopped communicating with their employees because key decisions had not been finalized and leaders didn't know what to say. We worked with the HR team on a two-hour workshop to help leaders understand why employees needed contact even if definitive information wasn't available. As

a result, 95% of attendees agreed that the session gave them what they needed to facilitate dialogue, address anxiety and gain buy-in for the merger.

We've seen it all before: Key leaders, like division heads, plant managers and VPs, are so wrapped up running their businesses, they forget to communicate with employees. How can you ensure your leaders and managers are engaging employees during change?

Counsel leaders and managers on how employees experience change. More than 80% of employees are initially resistant to change, partially because they experience change initiatives as a criticism of their work. Employees think, "You say this system/process is broken. But I've been doing this job for years. So, what you're really saying is that my work is bad."

The more leaders and managers understand employees' anxiety, the more successful you will be at convincing them to take a sustained approach to change communication.

Provide practical advice to leaders and managers. Communicating about a change can be stressful. In my experience, leaders and managers welcome tips to help them with their communication role. A useful technique is highlighting common communication mistakes and providing advice about what to do differently.

Don't:	Do:
Think only about the information you need to share.	Think from the employee perspective, "What does this mean to me?" Use specific examples of what employees need to do differently to help the company succeed.
Deliver a message once, then expect everyone to get it.	Repeat, repeat, repeat. By the time leaders are ready to introduce a change, they've been working with the issue for months. But employees are hearing it for the first time, so they need reinforcement.
Get irritated when hearing a question you've answered many times before.	Act patient, even if you don't feel that way. How well leaders answer questions can mean the difference between encouraging employees to speak freely and shutting people down.
Do all the talking.	Be a good listener. Letting people give voice to their anxieties has been proven by researchers to release tension.
Become defensive when someone asks a tough question.	Answer difficult questions. If leaders don't know all the details, it's OK to say, "I don't know," but make sure to tell employees you'll give them the rest of the information as soon as possible—and then be sure to follow through.

Encourage leaders to be visible. In every survey we conduct for our clients, employees tell us they want more communication from their leaders. The problem: Leaders are so busy that they don't have time for even one more town hall, small group

meeting, blog post or video interview—especially during times of change when they tend to hunker down and focus on what needs to get done. But visibility is essential to build trust and knowledge.

Make it easy by prescribing what to do; for example, ask each member of the leadership team to host a coffee chat this quarter and a functional meeting by the end of the year. Or one online chat focused on a topic. Create a communication plan for top leaders outlining what to do.

Prep managers. Although leaders are expected to know all the details about the change, employees often go to their managers first with questions. Your job is to prepare managers so they don't feel blindsided:

• Invite managers to participate in change workshops. Facilitate exercises that require managers with different roles to solve business challenges together.

• Hold an interactive brainstorming session where managers are asked to contribute ideas and potential solutions to questions.

Employ change champions

When change is significant, leading organizations often recruit *change champions* or *change agents.* These advocates are selected from across the company to become knowledgeable about the change and share that knowledge with colleagues. Such efforts work most effectively when advocates clearly understand their roles and are well prepared to communicate.

Change champions should represent areas of the business, such as department, function, role or location. They are the bridge between change leaders (those managing the change) and employees (those impacted by the change). Their responsibilities often include:
• Actively building awareness and understanding about the change in their business areas
• Listening and gathering feedback from employees
• Identifying knowledge gaps
• Sharing energy and enthusiasm
• Countering rumors with facts
• Providing resources to learn more about the change

Your job is to coach change champions, and ensure they have the information and tools they need to be successful.

💡 When an investment management firm underwent major technology changes—from virtual desktops to softphones—*tech coaches* were deployed to wander floors at key locations, and address problems and questions on the spot.

Include high-touch experiences

One of the most powerful ways to build deep knowledge is to hold sessions designed to encourage dialogue and interaction, answer questions and brainstorm solutions or approaches. When employees are involved in figuring out the details of a change, they're more committed to seeing it through. Here are a few examples:

• Workshops to solve a problem or figure out how to implement an aspect of the change

• Engagement sessions to identify barriers to change and solutions

• Coffee chats or meetings devoted solely to Q&A (No presentations!)

💡 When a food services company launched a new set of values, the head of communication intuitively knew that posters and emails wouldn't make the values meaningful. "How can we expect employees to behave differently if they see barriers to living these values?"

So we designed a high-touch experience: a workshop centered around a board game. As participants played the game, they were prompted to have conversations about key issues and identify solutions. The result was a deeper perspective about why the values were important and how colleagues could support each other to make them a reality.

Focus on questions

Often the team charged with leading a change is so embedded in the details, members have difficulty articulating it or helping others understand it. Questions are the perfect antidote to this *curse of knowledge.*

Here are my favorite techniques to get questions out in the open, so you can unlock multiple perspectives about a change and leverage that information across communication materials:

• **Create profiles of typical employees.** Ask members of the change team to put themselves in the shoes of these employees and brainstorm their questions.

• **Imagine the toughest, most in-your-face employee you know.** Then, draft questions that person would ask and craft candid answers.

• **Gather leaders and/or managers** and, after a quick overview, ask them to imagine rolling out the change: What questions will employees have? (Hint: This technique also uncovers leaders' and managers' questions.)

• **Conduct a focus group** (or two) with a group of cross-functional employees. Provide an overview of the change and ask attendees which questions need to be answered. While there will be common questions, the colleague from accounting will likely have a different perspective from the one in sales.

• **Check if your change management team conducted a stakeholder analysis.** This document outlines the potential challenges for employee groups, which may feed your thinking about questions that will come up.

The power of FAQs

Now that you have a bunch of great questions, use them to create an essential change communication tactic: the FAQ document. In my experience, a Frequently Asked Questions (FAQ) document is the resource managers prefer most.

Why it helps: Managers don't have all the answers. If you provide comprehensive FAQs, managers will be open to employees' questions about the change.

Measure frequently

**In this chapter,
you'll learn how to:**

✓ Identify and gather data to help you understand the impact of communication

✓ Use data to maintain your change communication plan—address gaps or move on when a priority is complete

When we ask those involved in communication about measuring the impact of their work, the reply is usually about anecdotal evidence: "Employees loved it!" Or, "Our leaders gave it a thumbs up."

The truth is, if we don't measure (or ask), it's a challenge to know if communication is working. "Employees loved it" doesn't tell us if communication made a difference.

Measurement during change is engaging

The folks at IBM completed research that reveals fielding more surveys during organizational change is a good thing.

Here's an example from the report: When comparing companies that went through layoffs with those that didn't, you see an expected drop in engagement (–23 points):
• Companies that laid off employees: 36% engagement index score
• Companies without a layoff: 59% engagement index score

But if an organization surveys during a layoff, the engagement score increases—minimizing the negative impact of the change:
• Layoffs without surveying: 36% engagement index score
• Layoffs with surveying: **55% engagement index score**
• No layoffs: 59% engagement index score

This research is a good reminder that asking for feedback during change is an effective communication strategy since it actively involves employees.

Gather data

Your first step is to regularly gather data, so you understand how communication is contributing to the goals of the change.

Here are five ways to include feedback mechanisms in your plan—a mix of quantitative and qualitative methods:

1. **Spot surveys** (three to five questions). If you're trying to build awareness or deep knowledge, a spot survey is a great way to test if you're breaking through. Try fielding a survey after a key moment, such as a town hall meeting or a big announcement. Depending on the duration of your communication plan, repeat the survey to assess progress.

2. **Behavior data.** Often a communication plan is designed to encourage a behavior or action, such as enrolling in a plan. Set a goal (for example, 90% will enroll by the end of the month) and track the results.

3. **Participation data.** Are employees using the tools you created? For example, if you created a microsite to keep everyone up to date on a new initiative, do employees visit the site? Which pages are most popular?

4. **Questions.** The topics employees ask about are important clues about what you need to address in your communication plan or follow-up communication. Collect questions during town halls and via email and intranet pages. The fun part is categorizing the questions and identifying themes.

5. Focus groups. Feedback can be fast. Facilitate a focus group to test key elements of your communication plan. And hold another session after you've launched to understand what's missing for employees.

When it comes to change communication, we rely on the tools listed above to provide results in five areas:

• **Participation with communication channels:** Do employees read/watch/attend? Do they complete training courses?

• **Satisfaction with communication:** Is the information useful? Is it convenient? Does it cover topics that interest employees?

• **Knowledge of key topics:** Most change includes learning. How well do employees understand the issues?

• **Attitudes:** Is communication shaping attitudes? For example, if the company is launching a new business strategy, do employees believe the organization is headed in the right direction?

• **Behaviors:** Are employees acting in a new way?

Share results

Presenting results is a powerful way to position yourself as a communication expert and garner support for updates to the communication plan. Here's how:

1. Identify stakeholders. You may want to share data with:

• **Members of your communication network** (those with communication responsibilities who don't report to you). When members of a communication network play a role in delivering communication, such as customizing change messages for their functions or teams, keeping them up to date will encourage their ideas and participation.

• **HR team.** If new skills or a reorganization is required to implement the change, HR team members are likely involved.

• **Senior leaders.** Since leaders play an important role in the change process, it's important they understand employees' feedback, so leaders know where to focus and what to do differently.

• **Change team.** The folks charged with making a change happen can lose sight of the big picture. Your data can bring them back to the reality of what employees are experiencing.

2. Show progress. Make it easy for everyone to understand how the change is progressing. Dashboards or scorecards are effective tools that summarize key measures and communicate the health of a change—at a glance.

Remember to consider your audience. Perhaps leaders get a different version of the change scorecard than the HR team, for example.

Here's a simple process to ensure results don't languish:

- Consider what you want to achieve/change
- Identify the stakeholders you need to get there
- Share the insights you gathered with those stakeholders and brainstorm next steps

Adjust your plan

During a recent meeting with a client, she asked, "After we finalize the communication plan, should we stick with it or tweak it?"

The answer is yes to both. You should absolutely stick to your plan. One of the advantages of a communication plan is that it sets a disciplined approach. Everyone knows what will happen and when.

But a *great* plan also includes measurement moments so it can be adjusted—improving the effectiveness of communication. Adjusting the communication plan is especially important for change communication as the change takes shape and priorities shift. Tweaks can take the form of changing key messages in tactics or changing communication channels altogether (adding new ones or removing those that are no longer useful).

At a financial services company going through a new brand positioning, we conducted a focus group to test the internal communication plan: Do we have the right tactics? Do the internal messages resonate? What do employees know about the current positioning? After the internal launch, we facilitated another focus group to assess the effectiveness of launch materials and identify information gaps. We used the results to adjust the communication plan and messaging.

The communication loop

Engaging minds and winning hearts requires an ongoing mix of communication tactics—from awareness tools to knowledge-building interactions. Measurement will help you adapt messages, adjust channels and build momentum. Rinse and repeat until change sticks.

Reinforce new behaviors

In this chapter, you'll learn how to maintain the momentum of your change effort by:

✓ Helping employees make the change part of their everyday lives

✓ Identifying barriers

✓ Demonstrating progress

After the change plan is complete and the team has delivered several core tactics, I often hear, "We sent the email and the town hall went very well! I think everyone gets it now." But to make change stick, there's more work to do:
• Lead by example
• Reduce friction
• Recognize success

Lead by example

Keep it going. Don't let your leaders, managers and change champions off the hook. Ensure they continue their communication roles so their actions support the change. For example, if you're running a cost reduction effort, do managers encourage their teams to find more opportunities to save money?

Honor the past. Unless your organization is teetering on the edge of collapse, it is still doing many things right—and has a foundation of success. When you create change messages, find ways to tell both sides of the story: what's strong and needs to continue, as well as what needs to change.

Align programs. Review your programs—from recognition to operational goals and compensation—against the new ways of working that you're building. Any disconnects? For example, if your goal is to improve safety at a manufacturing site, are rewards only tied to productivity (which may be a catalyst for safety issues)? While this may feel outside of your communication responsibilities, it's your job to raise the issue to the broader change team. Mixed messages will sabotage your communication efforts.

Reduce friction

Working in new ways is tough—especially when an employee gives it a try but the new platform doesn't work or she can't find the how-to guide. These and other sources of *friction* all add up to the same result: When it requires too much work to do things differently, employees give up.

As Bob Garfield, editor at *MediaPost,* writes in a column about online publishing, "Because it is human nature not to be bothered if bother can be avoided, it takes very little friction to stop a transaction, or any action, in its online tracks."

Good planning ensures that communication tools are easy to use, information is easy to find when it's needed and barriers are eliminated:

Make details easy to consume. When content is dense, words are difficult and terms are unfamiliar, it's a chore to get through communication. Encourage use of your communication tools by making them easy to navigate, keeping language simple and using visuals.

Organize information so it's easy to find. Here's a great example: Will a simple search on the intranet turn up helpful documents linked to your change effort? If it takes too much effort to find details or get questions answered, employees will get stuck when trying to build their knowledge. Tip: Employees use their terms when they search, not yours. For example, they will probably search "pay" rather than "compensation."

Eliminate barriers. While obstacles come in all shapes and sizes, identifying and eliminating barriers—including barriers that are not communication related—will encourage employees to follow through. Imagine how these scenarios would discourage employees from adopting a new way of working:
• A new platform doesn't work.
• A link is broken.
• The right data doesn't display.
• The website isn't mobile enabled, so it can't be viewed on a smartphone.
• A manager says, "This change doesn't apply to us. Just do it the way we always have."

Qualitative research (focus groups) is a quick way to ask employees what obstacles they're facing as a change is implemented. And usage data may provide clues. For

example, if you're implementing a new performance management tool, do employees complete the entire process or do they stop (get stuck) at a common place?

Recognize success

A key step in making change stick is to show employees the impact of change: the difference it has made on daily activities. This reinforcement creates a positive spiral where those who see great things happening want to join.

Sustaining a change requires an environment where employees see peers walking the talk, recognize that change is creating important results and believe they have a role to play.

Here are three ways to reinforce success and keep the momentum going:

1. **Demonstrate progress.** Help employees track progress of the change by sharing a project plan—from employees' perspective—and updating it regularly. Especially when dealing with a long, multi-step change, it's reassuring to know where you are and what's left to do.

   How to share progress? A few examples:

   • Update a **milestone tracker** and distribute in a weekly newsletter

   • Share **financial updates at a town hall** to illustrate bottom-line improvement

   • Create a **thermometer graphic** to show progress in real-time (we've reached 25% of our goal…now 48%…and so on) and post it on the intranet home page

   • Develop an **article and poster series about employees** who are demonstrating the new behaviors: showcase a new employee each week with the story of what he or she did to support the change and how this work is impacting the final goal

   ☀ When an insurance company upgraded its HR information system, all employees needed to update their paycheck information and start tracking time on specific dates. We created a timeline that mapped system changes by date so employees could easily follow along.

2. **Celebrate milestones.** Milestones are key dates and achievements along your change journey. And they're worth celebrating! Each time a milestone is reached, create a memorable moment—from a team huddle to an all-employee meeting to a congratulatory message from the CEO—to mark the achievement.

3. Recognize employees. There are few better ways to build pride and engagement than to recognize employees for their hard work. Feature these achievements by embedding special shoutouts to individual contributors and teams in your communication channels:

- Articles in a newsletter
- Mentions during a town hall
- An honor wall
- Silly trophies during events: "Most likely to keep the team smiling!"

Consider developing an award program where employees can nominate their colleagues for outstanding contributions to the change initiative.

For a major IT data center upgrade, a global pharmaceutical company created a large team comprised of fully dedicated staff; part-time workers who provided specific expertise; and partners across the organization who contributed knowledge, access to equipment and files, advocacy and more. After the successful close of the initiative, project leadership honored the entire project team by hosting an offsite celebration party—complete with catering, music, photo booth, gifts and more. What a way to conclude a long, challenging change project and reinforce the importance of employees' dedication!

How to apply what you learned

We've covered a lot: creating alignment across the organization, developing a change communication plan, driving awareness, building knowledge, assessing progress and maintaining momentum. Let's wrap it up by revisiting the five challenges summarized in the Introduction. In each of these situations, how could communication be handled differently to ensure success?

Symptoms	Steps that are critical to success	Communication approach/ solutions
Challenge 1: Lack of senior leader commitment		
Leaders don't: • Agree with the change or parts of it • Talk about the change • Lead by example; that is, demonstrate new behaviors	**Step 1.** Get stake-holders on board **Step 4.** Build deep knowledge **Step 6.** Reinforce new behaviors	• Create opportunities for leaders to learn about the change and provide input before it launches to the organization. • Prepare leaders for their communication role. For example, help them translate what the change means for their respective groups. • Conduct research: Ask employees if leaders are doing their part.
Challenge 2: Resistance from key leaders or managers		
• A group or team doesn't participate and relies on old ways to get things done.	**Step 1.** Get stake-holders on board **Step 5.** Measure frequently	• Before launch, conduct a stakeholder analysis to understand where the change may get stuck. • Test change scenarios with teams or groups to identify potential bottlenecks. • Create opportunities for leaders and managers to learn about the change and provide input before it launches to the organization. • Review participation data: Which groups are using the new system/which aren't?

Challenge 3: Too soon, too vague

• Early communication lacks detail and doesn't describe impact. • Employees don't engage in change when it finally hits.	**Step 1.** Get stake-holders on board **Step 2.** Develop your plan **Step 3.** Drive awareness	• Work with the change management team to plot high-level milestones, including key decisions. Use this overview to time communication, so there's a just-in-time focus balanced with advanced notice.

Challenge 4: A positive spin

• Messages are not specific and don't explain what the change means to employees. • Employees have lots of questions.	**Step 1.** Get stake-holders on board **Step 2.** Develop your plan **Step 3.** Drive awareness	• Shape a complete story—even if specifics are not identified yet—that includes context, vision and high-level plan. • Coach leaders about their communication role, including key messages and the details they can provide. • Provide opportunities for employees to ask questions: live or via communication channels. • Balance inspirational messages with language that is rooted in reality and is easy to understand.

Challenge 5: Move on before the job is done

• Leaders stop talking about the change and employees ask, "What about that change? Are we done?" • Information is not balanced: Some initiative teams share more than others.	**Step 1.** Get stake-holders on board **Step 2.** Develop your plan **Step 6.** Reinforce new behaviors	• Map the initiatives required to implement the change and keep stakeholders accountable to provide updates. • Meet regularly with the change team to understand progress and shifting priorities. Share these updates with employees. • Declare when an initiative is done or the change is complete.