MITIGATING RISK & REMOVING FEAR FROM ORGANIZATIONAL PROCESS CHANGE

Practical Tips for Human Services Administrators

INTRODUCTION

Progress of any kind always has, and always will, involve change. For many human services agencies, organizational process change is often the riskiest aspect of implementing new software. Yet in order to continuously improve today, agencies must embrace organizational process changes—and the risk and fear that accompany them. As a human services administrator, your ability to understand and mitigate these risks and fears can mean the difference between process change success and failure at your agency.

THE HUMAN FACTOR

Forrester has reported that the reason 70% of business process changes fail is because organizations tend to underestimate the importance of the emotional, human aspect of change. After all, changing a business process requires individual changes on the part of every worker impacted. If workers aren't willing to open their minds or change their habits, they won't adopt the new process, and the project will fail. Understanding what motivates stakeholders to change, as well as the conditions that may cause them to become fearful and "change-resistant," can help you mitigate risks throughout the process change. The following tips should serve as guideposts as you plan for each phase of the change.

PHASE 1:
PLANNING THE CHANGE

KNOW YOUR AUDIENCE

When you need to convince leery top management or skeptical end users of the value of the proposed process change, the WIIFM (What's In It For Me) principle can be useful. This tactic requires that you know your audience and are able to share factual benefits that are of value to them. For example, when you need to secure budget for the project from upper management, stay focused on operational efficiencies, productivity gains, and the expected return on investment. To rally support from end users, communicate how the change will make their jobs easier—and be specific. The social worker who learns that the new process will reduce her paperwork burden by one hour per day—giving her more time with clients—will look forward to the change rather than fear it. So too will the food and nutrition caseworker who learns that a new way of checking clients into the lobby will ease how he processes walk-ins, allowing him to process applications more quickly because he has information about the client's needs before he actually sees the client.

A word of warning:
Stick to the facts and don't use hype when presenting audience-specific benefits such as these. Overpromising results will only create unrealistic expectations—which if they aren't met, could discredit you and the new process, and negatively impact user adoption.

ASSEMBLE THE "RIGHT" TEAM

LEARN HOW YOUR PROJECT TEAM CAN AFFECT USER ADOPTION

A great project team can mean the difference between a well-run organizational process change and one that is destined to fail. In building the team, consider how both the vendor and agency will be represented. Hopefully, change management experience with human services agencies factored heavily into your decision on solution provider. You don't want your agency to become a guinea pig for an unproven solution or a vendor that doesn't understand change management within the human services setting.

When determining agency representation for the team, be sure that all business units that will be affected by the change are represented. Select individuals who are good communicators, liked and respected by their peers, able to work well under pressure, and open to change. It is important that they also possess solid time management skills since their workloads will increase during the project. The "right" individuals will not only help the project move more smoothly but can also help ease other workers' fears and accelerate buy-in across the agency before, during, and after implementation.

PHASE 2:
MANAGING THE CHANGE

Once the new software solution has been implemented, end user training is the next critical milestone—one that can be fraught with risk. Diligent planning upfront, however, can save you from the expense and perils of ineffective user training and low adoption.

Along with content, you need to carefully consider the format, length, and timing of training. Some training formats are more effective than others. David Maxfield, a social scientist specializing in organizational change, has spoken many times about the efficacy of the practice of "show, don't tell." Since 65% of the population are visual learners, it makes sense that kinetic, demonstrative training can engage a majority of users more effectively than lecture- or text-based training. Additionally, a coaching approach has been found to be more effective than the train-the-trainer model for certain human services agencies. The bottom line? If you choose a format and content that keeps users engaged during training, they are more likely to remember and apply what they've learned—and adoption will naturally follow.

LEARN WHY COOKIE-CUTTER TRAINING WON'T CUT IT.

The time required to properly train users, however, can present challenges for the agency and users alike. Following the hints below can help you reduce risk in this regard:

- Rather than training the entire agency at once, mid-size to large agencies should divide staff into training groups and hold training over the course of several days. When establishing the groups, ensure that every business unit will have proper coverage during training so that clients and casework don't suffer as a result.

- Limit training sessions to no more than 4 hours per day. This will help workers retain what they've learned without overwhelming them, and prevent them from falling too far behind on their regular workload. Additionally, have a plan in place for catching up workers who are called out and must leave training sessions. Provide them access to the training materials and information at a later time.

- Plan how users will manage existing workloads while they are in training. For child support and economic services workers, it might mean not scheduling appointments the hour after training so that walk-ins who are waiting can be served. For child welfare workers, it might mean allowing a flexible work schedule during training to give them time to complete home visits and paperwork outside of normal business hours.

- Hold brief, 10-minute "stand-up" meetings daily so that the project team can quickly share observations from training. Post FAQs or Tips & Tricks that come out of the meetings on a whiteboard or bulletin board in a high-traffic area that workers can view on a daily basis. Or share the information in a group email with main ideas bulleted succinctly.

PHASE 3:
STRENGTHENING THE CHANGE

If users fail to adopt the new process into their daily work routines, the project has failed. End user support that immediately follows training provides a valuable opportunity to reinforce what users have learned, facilitating a higher rate of adoption. By following a few proven support practices, you can help reduce workers' fears about incorporating the new process into their daily work routines:

- Plan to provide support for 2-3 weeks immediately following training. Any less, and users won't have enough time to work with the new process to know if and where they need support. Support that includes both access to solution provider experts and help from agency peers is often ideal.

- Make sure that the support format aligns with users' needs and comfort levels with technology. Online support may be fine for some workers, while others may prefer support over the phone or in person.

- Keep track of common issues and questions that surface during support and share them with users and the project team. Depending on how they like to be communicated with, a group email with bullet points or a whiteboard/bulletin board in a high-traffic common area will do the trick.

CONCLUSION

Change can be difficult for organizations and individuals alike. It begets risk and fear, both personally and organizationally. Nonetheless, human services agencies must embrace organizational process changes in order to drive continuous improvement. The ability to mitigate the risks and fears involved with process change can be the difference between change management success and failure.

Organizations that fail to address the emotional, human aspects of change tend to have process change initiatives that fail. You can help ensure success and a high rate of adoption for your agency's initiative by taking time to understand, plan for, and mitigate the risks and fears that typically accompany each phase of an organizational process change.

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