Best Practices in Technology Change Management

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Session Take-Aways

Best practices for:

1. How to approach technology change through your enterprise
2. Initiate sustained action for vision and strategy execution
3. Understanding of where to start with your change initiative(s)
Change verb \ˈchānj\

: to become different

: to make (someone or something) different

: to become something else
“Organizational change management is a leadership induced process that involves transformational organizational change that leadership controls and sustains. It requires leadership dedication, involvement of employees at all levels, and constant communication. Transformational change is strategy-driven and stems from the top of the organization.”

- Harry Hertz, Baldridge Performance Excellence Program, NIST
1. Create Sense of Urgency
2. Build Guiding Coalition
3. Form Strategic Vision and Initiatives
4. Enlist Volunteer Army
5. Enable Action by Removing Barriers
6. Generate Short Term Wins
7. Sustain Acceleration
8. Institute Change

The Big Change Opportunity

Source: Kotter International, 2015
Technology Change Management Process
3 Phases of Change Management

Awareness          Adoption          Advocacy

Source: Global Tech “Experience Change”  ExperiencePoint, Inc
Sense of Urgency
Mutual Understanding

What are the business drivers of your technology change management initiative(s)?

Questions to ask:
1. Why?
2. Why me?
3. Why now?

Step 1: Create a Sense of Urgency
Technology Change Inhibitors

Why change fails

Common reasons for being “stuck”:

- Complacency or futility
- Lack of communication of vision
- Insufficient executive buy-in or sponsorship

Step 1: Create a Sense of Urgency
Building Your Change Team

The Guiding Coalition

Establish a committed team of:

- A representative of various business areas
  - i.e. Police, Fire, Planning
- A representative of various operational areas
  - i.e. IT, Sales, Marketing
Technology

Vision vs. Strategy

**Vision:** A brief 1-2 sentence “elevator pitch” about how your organization utilizes technology to accomplish its mission.

Step 3: Form Strategic Vision and Initiatives
Technology

Vision vs. Strategy

**Vision:** A brief 1-2 sentence “elevator pitch” about how your organization utilizes technology to accomplish its mission.

**Strategy:** The steps (action items) to enact the vision.

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**Step 3: Form Strategic Vision and Initiatives**
Clearly Communicate Vision
Technology Change

This is an opportunity to engage the organization to do their part in mission execution.

Motivate by clarification of individual purpose of role.

Step 3: Form Strategic Vision and Initiatives
<table>
<thead>
<tr>
<th>Organizational Level</th>
<th>Time Span</th>
<th>Strategic Plan Element</th>
</tr>
</thead>
<tbody>
<tr>
<td>C-Level Executives</td>
<td>5+ years</td>
<td>Vision</td>
</tr>
<tr>
<td>D-Level Directors</td>
<td>2-5 Years</td>
<td>Goals</td>
</tr>
<tr>
<td>M-Level Managements</td>
<td>6 mo. – 1 year</td>
<td>Objectives</td>
</tr>
<tr>
<td>S-Level Supervisors</td>
<td>Quarterly-6 mo.</td>
<td>Initiatives</td>
</tr>
<tr>
<td>Knowledge Workers</td>
<td>1 Day- 1 month</td>
<td>Tasks</td>
</tr>
</tbody>
</table>
"If we establish data standards then…"

“If we utilize collector app then our team will be able to send information more effectively back to the command center.”

Source: “Get Your Team to Do What it Says it’s Going to Do”, Heidi Halvorson, Harvard Business Review, May 2014
Building A Change Strategy
If-Than Planning

Step 1: Goals
- Establish broad organizational goals
- No jargon rule

Step 2: Sub-Goals
- Specific, concrete sub-goals

Step 3: Actions
- Specific action(s) to complete sub-goal
- Identify who-when-where

Step 4: If-Then
- If-Then statement defining outcomes of actions

Source: “Get Your Team to Do What it Says it’s Going to Do”, Heidi Halvorson, Harvard Business Review, May 2014
Building A Change Strategy
If-Than Planning Statistics

Turning in weekly Report Promptly

If-Then Planners: **1.5 Hours Late**
Non-Planners: **8 Hours Late**

Source: “Get Your Team to Do What it Says it’s Going to Do”, Heidi Halvorson, Harvard Business Review, May 2014
Building A Change Strategy
If-Than Planning Statistics

Exercising Regularly

If-Then Planners: 91%
Non-Planners: 39%

Source: “Get Your Team to Do What it Says it’s Going to Do”, Heidi Halvorson, Harvard Business Review, May 2014
**Organizational Goal:** Ensure the U.S. proactively maintains its critical transportation infrastructure in a state of good repair

**Supporting GIS Goal:** Establish a GIS community to foster collaboration of data between Federal, State, and Local agencies

<table>
<thead>
<tr>
<th>If (Action)</th>
<th>Then (Outcome)</th>
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<tbody>
<tr>
<td>USDOT implements ArcGIS Online by the end of FY2016…</td>
<td></td>
</tr>
<tr>
<td>USDOT establishes efficient collection of field data using Collector App by Q4 2016…</td>
<td></td>
</tr>
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</table>
**Organizational Goal:** Effectively manage the forests to protect from invasive species and foster long-term health.

**Supporting GIS Goal:** Establish a GIS community to foster collaboration of data between Federal, State, and Local agencies

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<td>Forest Service uses mobile applications by March of 2017 for collecting field data…</td>
<td></td>
</tr>
<tr>
<td>Forest Service is able to share and use data to/from external sources by June of 2017…</td>
<td></td>
</tr>
</tbody>
</table>
**Organizational Goal:** “Our mission is to make our stores your preferred shopping destination in all channels by delivering outstanding value, continuous innovation and exceptional guest experiences…”

**Supporting GIS Goal:** Understand geographic shopping patterns of customers to meet their consumption needs.

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<td>Our marketing team adopts location analytics into our workflows by Q4 2016...</td>
<td></td>
</tr>
<tr>
<td>Supply Chain management is able to visualize where specific product demand is strongest by Q1 2017...</td>
<td></td>
</tr>
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**Step 3: Form Strategic Vision and Initiatives**
**Organizational Goal:** Engage with the conservation community to grow the membership of our non-profit organization.

**Supporting GIS Goal:** Coordinate regional membership drives with local volunteers.

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<td>We adopt geo-enable our membership database by Q4 2016…</td>
<td></td>
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<tr>
<td>We use map stories to communicate our conservation efforts on our web-site by Q1 2017…</td>
<td></td>
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Step 4: Enlist Volunteer Army

Know Your Stakeholders

- Champions
- Resisters
- Technology Change
- Bystanders
- Helpers
Know Your Stakeholders

- We don’t have time
- We don’t manage data that way
- Staff Resistant to change
- That’s not our workflow!
- Sounds Great!
- We’ve always done it this way
- We don’t manage data that way
- My team doesn’t need this
- It’s too difficult
- It’s too difficult
- The way we do it works just fine.
- Yeah, right...
- OK, sounds good
- How can I help?
Know Your Stakeholders

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How can I help?
1. Create Sense of Urgency
2. Build Guiding Coalition
3. Form Strategic Vision and Initiatives
4. Enlist Volunteer Army

The Big Change Opportunity

Source: Kotter International, 2015
5. Enable Action by Removing Barriers

6. Generate Short Term Wins

The Big Change Opportunity

Source: Kotter International, 2015
Strategic Plan

What are you building
Focus on the business workflows
Pick the top 5 critical workflows

Step 5: Enable Action by Removing Barriers
Adoption

Recognize short-term wins
Re-affirm commitments, project understanding
Continue to build relationships
Reinforce objectives, success criteria

Step 6: Generate Short Term Wins
How to implement the Esri Platform

- Deploy the complete platform
- Create a destination with portal
- Configure first, customize second
- Create useful information products focused on your business needs
- Get everyone in your organization involved

Step 6: Generate Short Term Wins
Common Approach

Initial Operating Capability
- Foundation Apps
- Essential Information Products

ArcGIS Online Portal
- Server
- Online Content and Services

Desktop
- Web
- Device

Intеgrated Enterprise System
- Extended / Custom Apps
- Integration with Business Systems
- Advanced Workflows
- Content Production Systems
- Data Modernization

“GIS Ready” Data
Quick Wins

• Where is the low hanging fruit?
• Set a quick tempo
• Create and recognize short term wins
• Define and engineer visible performance improvements

Step 6: Generate Short Term Wins
5. Enable Action by Removing Barriers
6. Generate Short Term Wins

The Big Change Opportunity

Source: Kotter International, 2015
The Big Change Opportunity

7. Sustain Acceleration
8. Institute Change

Source: Kotter International, 2015
Sustaining Change

- Leverage early wins to establish and accelerate change
- Invest in developing employees
- Reinvigorate the change process with new projects
- Communicate up and down your chain of command
Advocacy

- Success breeds success – how do you publicize your success?
- Adding a new community of change champions
- Broadens the reach of the change initiative
- Team and individuals success creates new advocates
What makes an advocate, advocate?

- Individual and team success
- Recognize improved business
- Belief in the vision of the change initiative
- Envision continuous improvement
Technology Change: Initial Reactions

- We don’t have time
- We manage data that way
- Staff Resistant to change
- Sounds Great!
- That’s not our workflow!
- OK, sounds good
- We’ve always done it this way
- We don’t need this
- The way we do it works just fine.
- Yeah, right...
- How can I help?
Technology Change: The New Reaction

This saved me time!
That was great!
How can I help?

I didn't know that about our business.
That was surprisingly simple.
The way we do it works just fine.

I like this new way of doing things.
That’s not our workflow!
Can I try it this way?

What’s next?
Sounds Great!
I see how this helps my team.
Advocacy
“If I had asked people what they wanted, they would have said ‘faster horses.’”

Henry Ford
Questions?

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