Best Practices in Technology Change Management

David Schneider

Jennifer Vaughan-Gibson

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

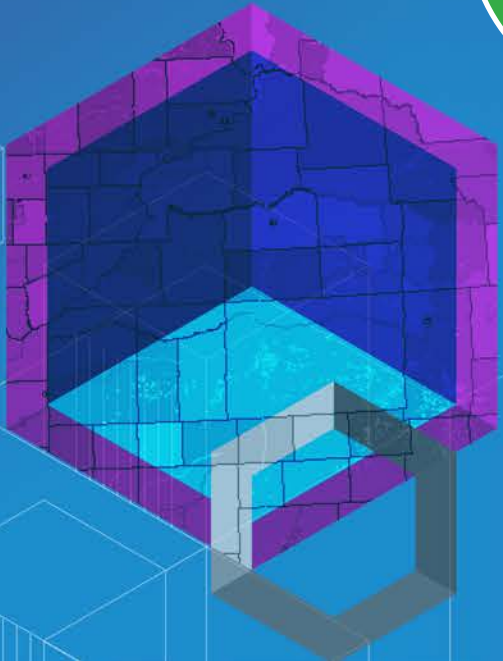*verb \ˈchānj*

: to become different

: to make (someone or something) different

: to become something else

Change

"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*

Best Practices for Technology Change Management

The Big Change Opportunity

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. **Instistute** Change

Source: Kotter International, 2015

Technology Change Management Process
3 Phases of Change Management

Awareness → Adoption → Advocacy

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?**

Awareness

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

Awareness

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

Awareness

Step 2: Build a Guiding Coalition

Technology

Vision vs. Strategy

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

Awareness

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.

Awareness

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.

Awareness

Step 3: Form Strategic Vision and Initiatives
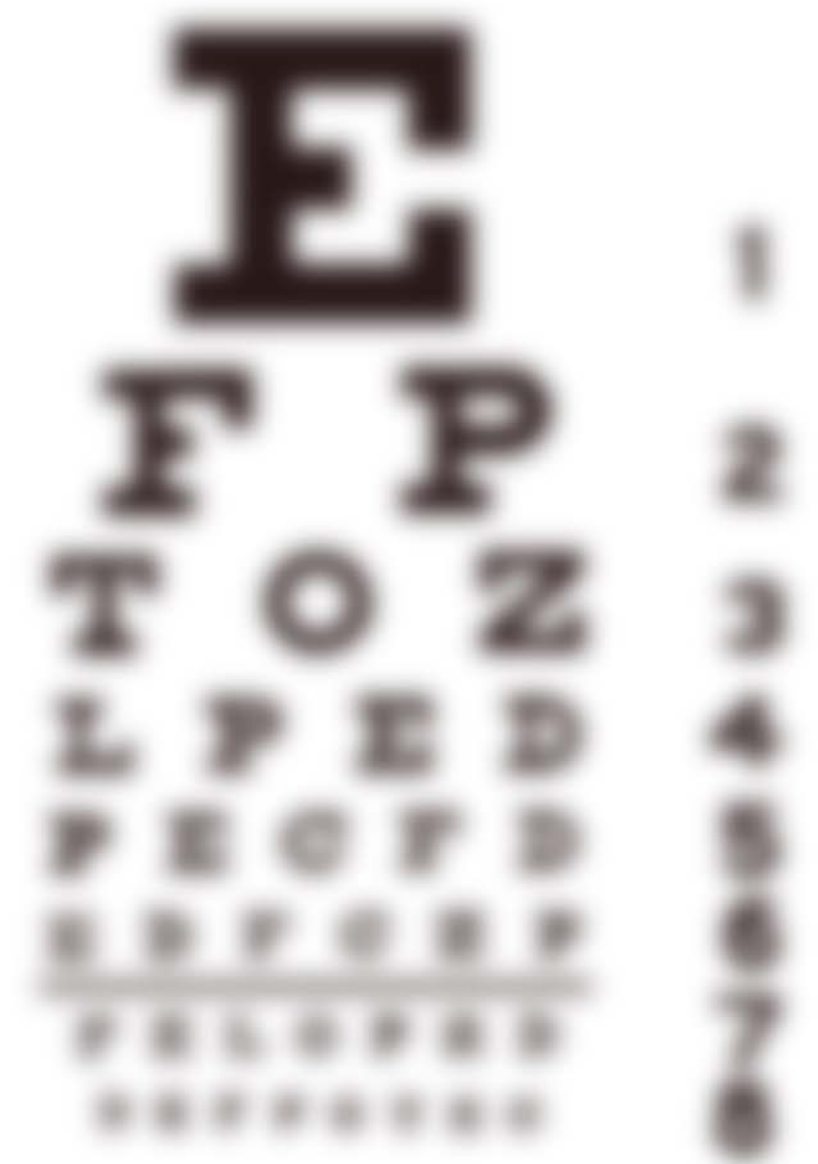
Organizational Level	Time Span	Strategic Plan Element
C-Level Executives	5+ years	Vision
D-Level Directors	2-5 Years	Goals
M-Level Managements	6 mo. – 1 year	Objectives
S-Level Supervisors	Quarterly-6 mo.	Initiatives
Knowledge Workers	1 Day- 1 month	Tasks

Communicating A Change Strategy
If-Than Planning Establishes Buy-In

" **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."

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

Building A Change Strategy
If-Than Planning Statistics

Exercising Regularly

If-Then Planners: 91%

Non-Planners: 39%

Organizational Goal: Ensure the U.S. proactively maintains it's 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	

If (Action)	Then (Outcome)
USDOT implements ArcGIS Online by the end of FY2016…	
USDOT establishes efficient collection of field data using Collector App by Q4 2016…	

Awareness

Step 3: Form Strategic Vision and Initiatives

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	
If (Action)	**Then (Outcome)**
Forest Service uses mobile applications by March of 2017 for collecting field data…	
Forest Service is able to share and use data to/from external sources by June of 2017…	

Awareness

Step 3: Form Strategic Vision and Initiatives

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.

If (Action)	Then (Outcome)
Our marketing team adopts location analytics into our workflows by Q4 2016…	
Supply Chain management is able to visualize where specific product demand is strongest by Q1 2017…	

Awareness

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.	
If (Action)	**Then (Outcome)**
We adopt geo-enable our membership database by Q4 2016…	
We use map stories to communicate our conservation efforts on our web-site by Q1 2017…	

Awareness

Step 3: Form Strategic Vision and Initiatives

Know Your Stakeholders

Champions

Resisters

Technology Change

Helpers

Bystanders

Awareness

Step 4: Enlist Volunteer Army

Know Your Stakeholders

Know Your Stakeholders

The Big Change Opportunity

1. **Create** Sense of Urgency

2. **Build** Guiding Coalition

3. **Form** Strategic Vision and Initiatives

4. **Enlist** Volunteer Army

Awareness

Source: Kotter International, 2015

The Big Change Opportunity

6. **Generate** Short Term Wins

5. **Enable** Action by Removing Barriers

Adoption

Source: Kotter International, 2015

Communication Tools

Strategic Plans

GIS Working Groups

Outreach Initiatives

Adoption

Step 5: Enable Action by Removing Barriers

Strategic Plan

What are you building

Focus on the business workflows

Pick the top 5 critical workflows

Adoption

Step 5: Enable Action by Removing Barriers

Replacing Existing System

Creating New Opportunity

What Value are you adding

Who are the Users
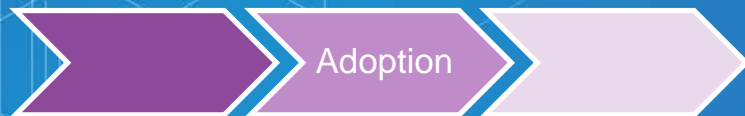
What are the priorities
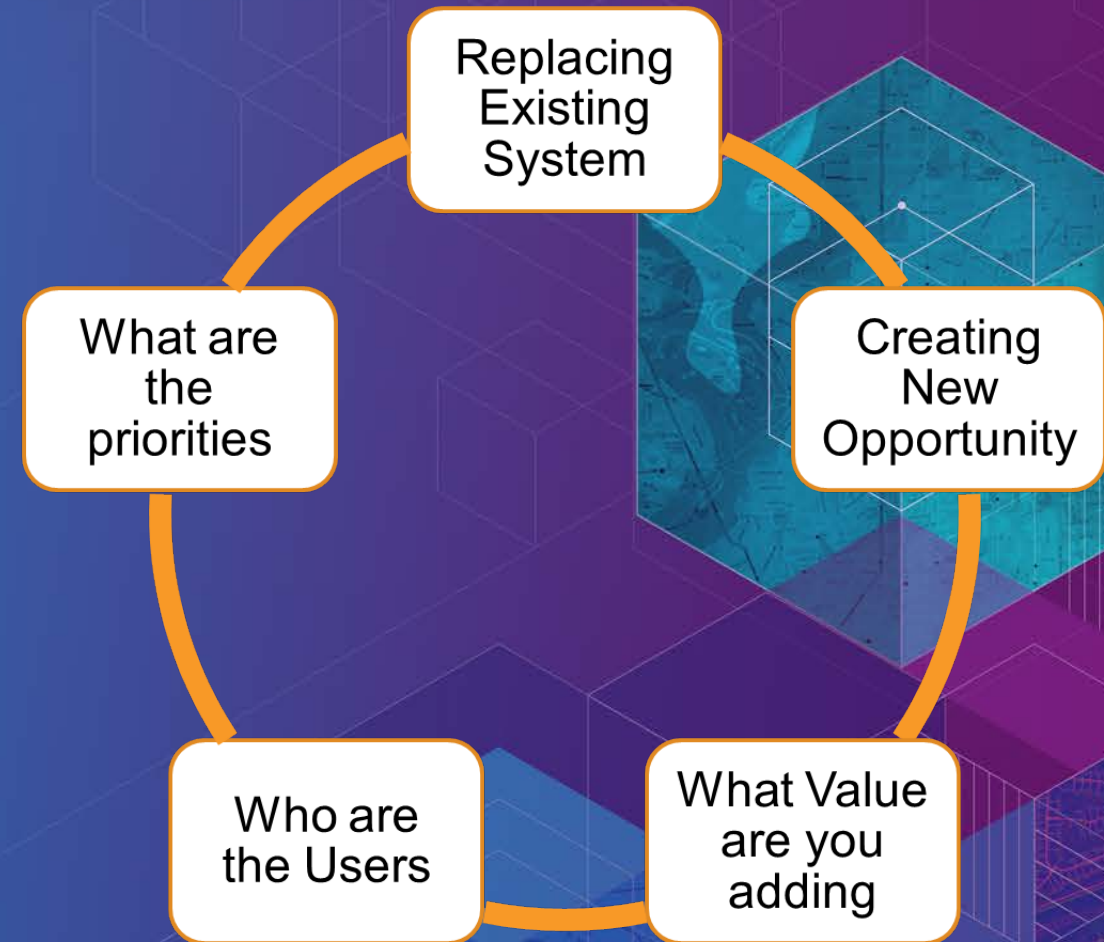
Adoption

Recognize short-term wins

Re-affirm commitments, project understanding

Continue to build relationships

Reinforce objectives, success criteria

Adoption
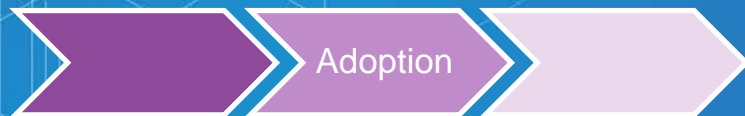
Step 6: Generate Short Term Wins

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**

Adoption
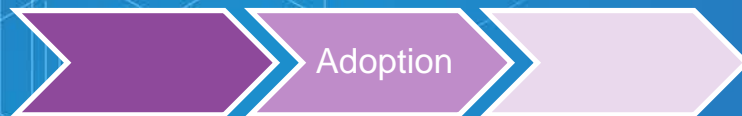
Step 6: Generate Short Term Wins

Common Approach

Initial Operating Capability

Integrated Enterprise System

Desktop Web Device

Foundation Apps
Essential Information Products ▶

ArcGIS Online Portal

◀ Extended / Custom Apps

◀ Integration with Business Systems

◀ Advanced Workflows

Server

"GIS Ready" Data ▶

Online Content and Services

◀ Content Production Systems
Data Modernization

Quick Wins

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

Adoption

Step 6: Generate Short Term Wins

The Big Change Opportunity

6. **Generate** Short Term Wins

5. **Enable** Action by Removing Barriers

Adoption

Source: Kotter International, 2015

The Big Change Opportunity

8. Institute Change

7. Sustain Acceleration

Advocacy
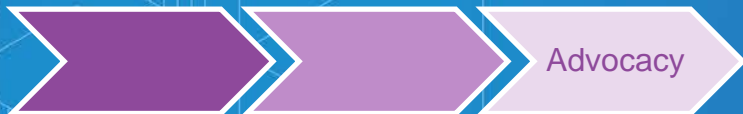
Source: Kotter International, 2015

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

Step 7: Sustain Change

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**

Advocacy

Step 7: Sustain Change
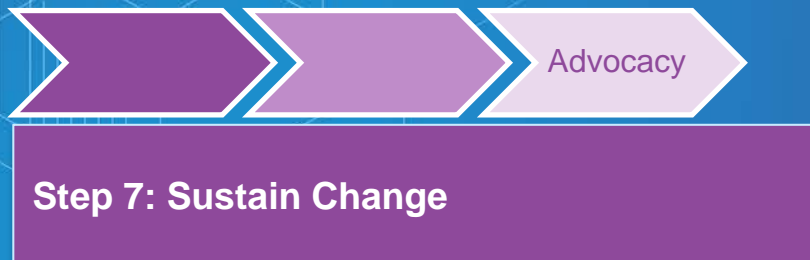
What makes an advocate, advocate?

- **Individual and team success**

- **Recognize improved business**

- **Belief in the vision of the change initiative**

- **Envision continuous improvement**

Advocacy

Step 7: Sustain Change
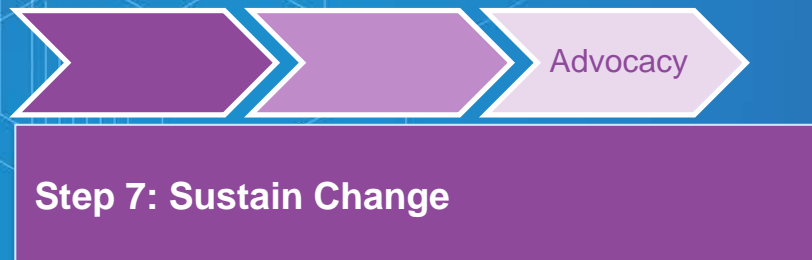
Technology Change: Initial Reactions
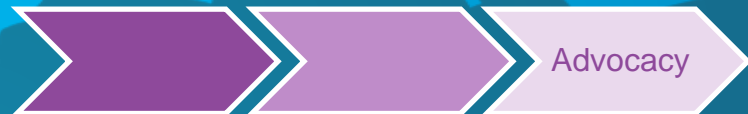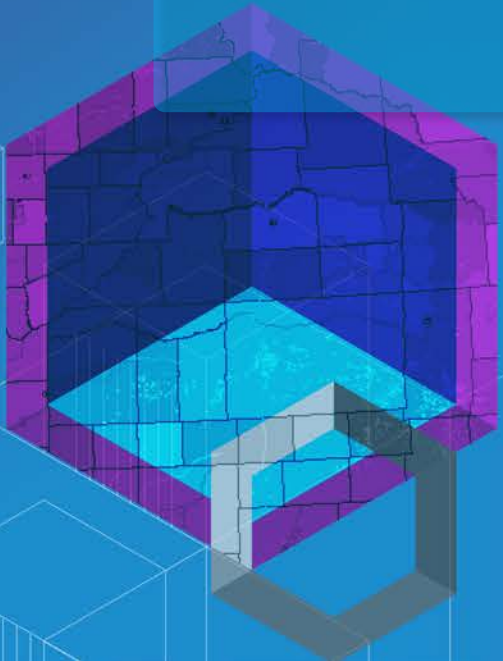
Questions?

David Schneider Dschneider@esri.com

Jennifer Vaughan-Gibson Jvaughan-Gibson@esri.com

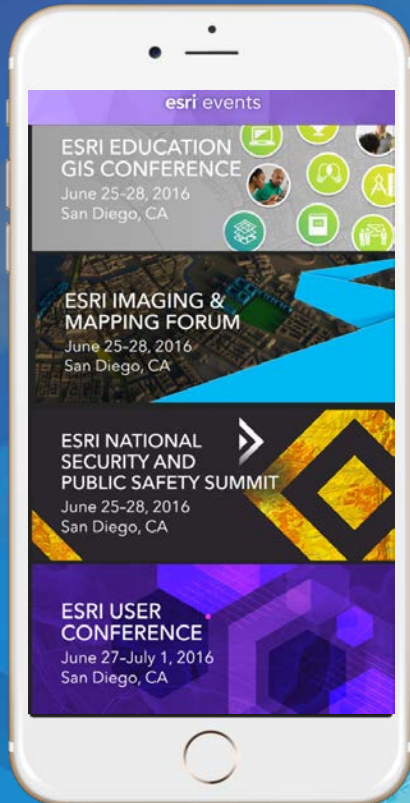# Don't forget to complete your digital session survey
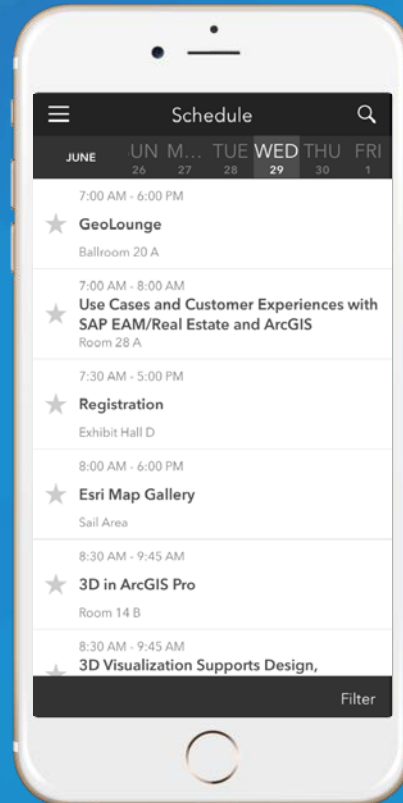
Download the Esri Events app!

Please take our Survey

Your feedback allows us to help maintain high standards and to help presenters
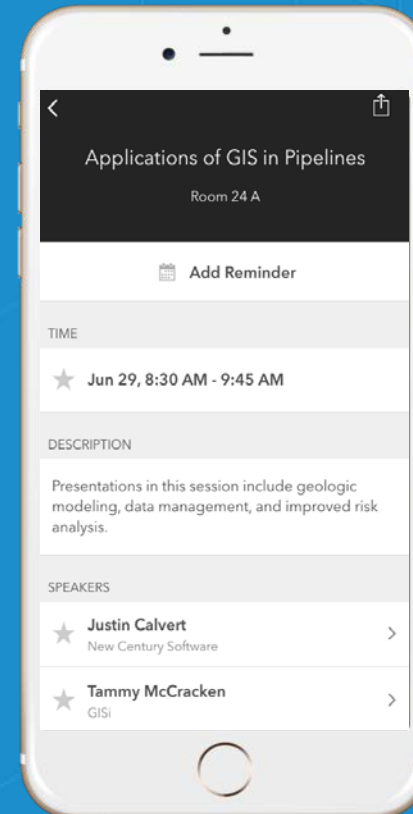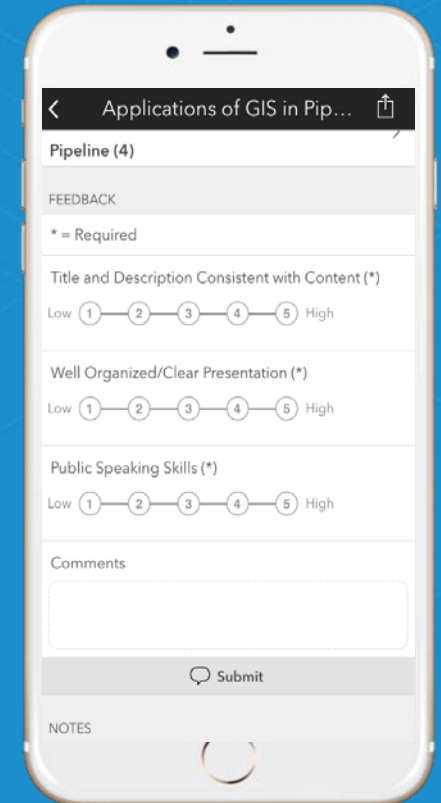
| Find your event in the Esri Events App | Find the session you want to review | Scroll down to the bottom of the session | Answer survey questions and submit |

Please Take Our Survey!