

## **Table VII:2 – Summary of Principles for Successful Change**

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### **Nature of Overall Organizational Change Process**

- A change process is a “journey” that you take with your client.
- Each change process with each client is different – it is highly customized.
- A change process rarely is an “aha!” experience.
- A change process usually takes longer than you think.

### **Your Role as Consultant and Change Agent**

- Manage your time and stress.
- Recognize the effect of your own nature on others during the change process.
- Adhere to your personal values and ethics.
- Although change is often unpredictable, have at least one change model in mind.
- Build trust, commitment and collaboration with your client.
- Get some ongoing, “outside” feedback on your project’s plans and conclusions.
- Maintain sufficient skills in your primary areas of service.
- Have at least basic understanding of a range of consulting services.
- Do not try to control change, but instead to guide it during the project.

### **Core Requirements for Your Client**

- Your client must have the resources to implement the plan for change.
- Your client needs to be ready for the change process.
- Top leadership in your client’s organization must support the project.
- Your client must take ownership in the change process.
- Your client must trust you, and you must trust your client.

### **Core Areas of Focus for the Change Process**

- Ensure project activities are focused on overall organizational goals.
- Integrate project goals into the context of overall organizational goals.
- Focus on “success” for the project – define “success” early in the project.
- Focus on activities that cause the symptoms of the problems.
- Focus on major organizational parts and their relationships.
- Focus on changing structures, not on changing personalities.
- Focus primarily on the first 20% of effort that generates 80% of results.
- Build from strengths at least as much as – if not more than – from weaknesses.
- Do not damage activities that provide high-quality products and services.
- Focus on getting some quick successes in the project.
- Consider current grant requirements – those have to be met.
- Schedule the project’s actions to occur on a timely basis.
- Integrate results throughout organization.
- Focus on accountabilities – have specific people responsible for specific actions.
- Focus on the process as much as on the final results.
- Focus on learning during the change process.

### **Core Components in Change Plans**

- Train your client about the basics of organizational change.
  - Include an integrated set of activities in your project plan.
  - Develop and communicate a written Change Management Plan.
  - Conduct assessments as benchmarks for change.
  - Plan for key roles during the change and identify the roles during the process.
  - Produce written action plans with indicators and timelines.
  - Manage expectations with your client.
  - Acknowledge accomplishments.
  - Specify how the project plan and action plans can be changed systematically.
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