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HR Policy: Change Management Check List

The following information can be used as a checklist to help ensure your policies and procedures for change management makes the most out of the changes you implement for your company, and overcomes the negative emotional hurdles on the way to success.

◈ **Planning**

Before beginning a change to the company, whatever it is, small or large, it is important to work out the Who, When, Where, How, Why and What about it. The plan doesn't have to be concrete, it is much better to have a plan that needs reviewing then to have no plan to refer back to. Your Human Resources Policy should stipulate that a plan is needed for all changes that are to be implemented.

Know the Laws: Some laws need to be taken into account when planning for company change. A couple of examples are ICE and TUPE regulations. ICE, Information and Consultation of Employees regulations, states that employees can request that arrangements are set up to inform and consult with them about issues with the organisation. Although these regulations only apply to businesses of 50 or more employees the guidelines set out in these regulations can be useful to aid transition for any business.

Resources: Without the right resources available at the right time a change can become a disaster field. Plan what resources are needed and when, and what extra resources may be needed to ensure any negative impacts during the transition are reduced:

• People: who is required to make the change run smoothly, do you need to bring in someone to oversee the changes (or maybe someone for health and safety or HR consulting etc.) or is there someone who can fill these caveats already in your company? Which employees will be required, and when, to receive information/training about the changes? Who needs to be involved with the planning/consultation phase of the changes?

• Company 'systems': which systems, and how will they be involved with the change and when? Does the change have knock effects to other systems that are not directly being changed?

• Communication services: How will the change information be given to employees, customers and suppliers? What communication services will be needed to perform the task?

• Time/timing: How much time is required for the change to take place? Will extra man hours be required to reduce the impact of employees learning new processes and knowledge? When would be the best time to make the change to avoid 'busy trading periods' to reduce negative impacts or to have the improvement in place in time for an event for better publicity?

• Training/Education: What extra training and education will be required, for who and when, to ensure that everyone knows what is expected of them during the change. How will the training/education be supplied?

• Change monitoring systems: How will you know if the changes are effective, what data needs to be collected before during and after the change?

Building a Vision/Value for the change: To be able to sell the change to your employees and customers as a move towards a better company, service or product a case for the changes needs to be built, a vision of the change value. Why is the change needed and how does the improvement outweigh the resources and possible negative impacts endured on the way? If a strong case cannot be made for the change in light of the resources required then the change should be reconsidered before continuing!

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◆ 'Communication/Training – Action – Auditing' Circle

Once the planning is as far as it can go without action and you've decided the change is definitely to go ahead, it is easy to forget that the change management is not finished at just writing the policy and processes. The policies and processes cannot just sit hidden in a book on a shelf; the circle of effective 'communication/training, action and auditing' needs to be implemented. It may be pertinent to address in your policies and procedures not only that the circle of 'communication/training – action – auditing' is required, but what best practice should be used at each stage for the company to gain the most from each change.

◆ 'Communication/Training

Effective communication is required both internally for employees and externally to suppliers and customers to ensure negative effects can be minimised or planned around and that the positive effects can be accentuated as a selling point for the company.

Instruction/Training: For employees to effectively action the change they need to be aware of the change and have the knowledge of how and when they are involved. Provision of appropriate communication of the instructions or training is required as well as enough time to take on board the knowledge ready for use.

Leadership/Team Motivation: How willing an employee is to put in the extra effort involved in dealing with change is greatly affected by the perceived value of the effort. Sharing the aim/vision that the change is working towards and the value of the change with the employees can help to motivate them. How and who you choose to deliver the information and lead the change is important to ensure that the messages keep the employees both positive and engaged with the change. Any form of change can lead to disruption, concern and take people out of their usual 'comfort zone'. It is too easy for change to be seen only as something negative, resulting in loss of morale and productivity. Be aware of supporting employees with the extra resources they need to achieve the change you want to see; to listen to concerns and suggestions for improvement; and to promote the positives to them, not just the company. How you manage the change with your employees will be the difference between a positive improvement that is achieved efficiently and with good results, or a slog to try to reach whilst battling the negativity of the people involved.

External Change Promotion: Allowing suppliers and customers to find out about the changes through firsthand experience, and allowing them to guess the reason for delays or changes in expectations from the company can lead to the wrong message being sent out of incompetence and poor management. Instead anyone who could be affected by the change during the transition period should receive timely notification of the possible negative effects to allow them to minimise the effect it has on them. The same communication can be used to promote the efforts being made by the company and how it aims to improve products or service to replace the negative feelings towards the effects with positive feelings towards the effort for a better product or service in the future.

Problem Solving: Open communication lines both externally and internally should be maintained to ensure that any problems that may occur can be caught as early as possible and dealt with. Ask your employees what they think of the change, and really listen. Employees are a great source of ideas for processes that they deal with every day so they may catch something you missed before it becomes an issue! Getting your employees involved with the evolution of your company not only ensures that you make the best choices but gives your employees a greater feeling that their knowledge and skills are valued.

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◆ Action

Keeping on Track: Monitoring the progress of the change is important to ensure that the transitional phase is as quick and painless as possible. Any barriers impeding the change should be identified and eliminated as soon as possible. Appropriate levels of priority need to be given to the change or it will fall to the way side in favour of 'business as usual'; if sufficient priority is not being given because productivity level cannot be held satisfactorily at the same time it may be necessary to rethink the plan to involve more man hours or to implement a work around to get the change fitted in.

Evolving the Plan: As stated near the beginning, the plan does not have to be concrete, in fact it is actually helpful if it is not set in stone. Refinement of the plan should be possible at any time to put into play any ideas that can improve the smooth transition or indeed the end point of the change. Also, amendments may need to be added to avoid, or minimise any problems that are only found during the implementation stage of the change. And of course, for all additions to the plan all necessary personnel need to be informed of the changes, the where, when and why so that everyone is working from the same script and can act accordingly on it.

Continued Motivation and Leadership: Communicating the successes of the change and acknowledging the individuals involved with the success can keep the positive vibe about the change pumping and keep employees motivated to push through to get the change in place where they may be currently sliding back. Getting top management involved with the acknowledgements even if just in name can also have a real impact on adding value to the change and improving employee motivation. Having management available on the 'shop floor' to help, not only identify change barriers, but to aid productivity during the transition where employees are struggling can show a greater understanding of the effort involved physically and mentally during a change creating a stronger bond between staff and company leadership also improving employee motivation.

◆ Auditing and Continuation of the Circle for Change Management

Auditing is essentially monitoring the success of the changes so that planning for future improvement and communicating of the progress to the company vision can continue. Policy and processes should be audited regularly: Are the policies being followed? Are changes working to improve the company? Can the policies be improved? Audits may lead to policy/process improvement or retraining of specific staff, or may prove that the set up is currently working. Appropriate actions indicated by the audit should be made and the chain starts again with communication/training of necessary staff about any amendments and communication of results achieved by the company. It is good practice to audit all policies and procedures including the auditing procedures themselves regularly, it may be useful to include a time table for auditing in your Human Resource Policy to ensure nothing gets overlooked.

◆ Building for Future Change

Managing change well not only improves the company due to the change itself but also improves the company image subsequently helping to increase the company's market base. Also, following a well managed change employee pride in their work is higher leading to higher levels of motivation and employees are likely to be more open to future change given success in previous change.

For more information on HR policies and procedures for change management see ACAS.

Holges Consulting provide support and advice for HR and Health & Safety. For assistance on this factsheet and other HR or H&S matters please contact: amanda@holgesconsulting.co.uk