

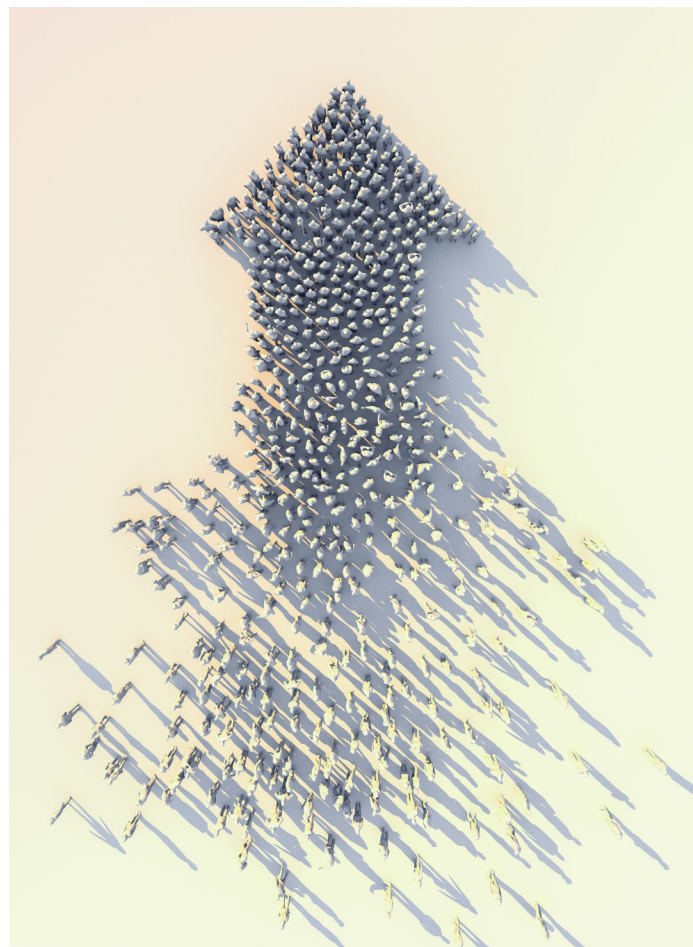
CASE STUDY

# Is Your Organization Ready for Its Latest Workplace Change: Assessing & Addressing Change Readiness

By Meryl Rosenthal, Chief Executive Officer, FlexPaths, LLC

*A change management and IT communications manager of a global life insurance organization engaged FlexPaths to help bring a change management discipline into their processes.*

*The following case study shares an approach that created a resonating foundation for change management and provided a practical application. It had executives come away embracing its criticality as they plan, prioritize, and implement future projects.*



## Understanding the Problem

Many well-intentioned leaders and managers send their best people to OCM training and certification programs; the newly certified change practitioners return to work, all fired up and ready to take on the world ... then it just fizzles. So it was no surprise when our client, returning from OCM training, shared that she wasn't getting any traction with their Organizational Change Management initiative.

Her full-time job was in corporate communications; however, she was being asked to include OCM in her role. Her boss was an EVP with a positive experience with OCM at another organization. His vision involved building an OCM capability within his division that could then grow and thrive corporate-wide. In engaging with the manager, she was struggling with the task that had been assigned to her.

## Assessing the Situation

Given these realities, we started with an assessment of Change Management Maturity to understand the current state. The organization scored close to Ad Hoc (Maturity Level 1). For most people, OCM was seen as "a distraction on the focus of installing technical solutions." This manager and her small team were a long journey away from the desired future state of "OCM as a structured approach that adds value" (Maturity Level 3). After a few meetings with the manager and key leaders, it became clear that we would need to employ OCM for OCM, i.e., the need to use a structured Organizational Change Management (OCM) approach and tools to gain awareness and desire for the use of Organizational Change Management. This then helped inform the go forward objectives.

## Aligning on the Objectives

The following objectives were articulated for FlexPaths to address.

- Increase understanding of OCM.
- Create an OCM success story to highlight.
- Show a ROI (return on investment) from OCM.
- Increase "pull" for OCM from the top of the organization.

## Addressing the Challenges

The following shares how we addressed each of the above-stated challenges.

### **Increase Understanding of OCM**

We started at the top, meeting with the CEO and then one-on-one with senior executive team members. The meetings were called interviews, but they also served as a way to pass along vital information.

We started by talking about risk and risk mitigation to get the executive's attention vs. change management. Risk is a word that will hold their ear for those critical few seconds while you get a key point across. Many executives will tell you they are paid to manage risk (not change).

Engaging with an executive on this topic is often like running through a series of hurdles.

- Hurdle 1 - Work to define OCM
- Hurdle 2 - Build Awareness for OCM. Get them to see why do they need it?
- Hurdle 3 - Then create Desire for OCM – why should they care and personally engage?

Once they had some Awareness and Desire for OCM, we could start to talk about their critical role in OCM as executive sponsors of change.

### **Create a Success Story**

The change management work done previously within the organization (OCM work done on a large project led by a large consulting firm) was all about communications and training. We needed an OCM Demonstrator project to show the team what structured OCM was and how it could benefit a critical project. Fortunately, the CFO was amidst a large enterprise-wide project for which he served as the executive sponsor. He agreed to include an OCM assessment as part of the project schedule, and we used tools to assess the project charter, project health, project risk, sponsorship, etc.

For more information on how OCM can be of value to your organization, please reach out to [Meryl Rosenthal](#).



The six assessment meetings were productive, whereby we identified some risks that might have otherwise gone unnoticed until it was too late.

### **Show the ROI**

During one meeting late in the engagement, the CFO asked, "What is the ROI from improving organizational OCM Maturity?" We used research data to show that a typical organization can expect a 30% improvement in project performance when they advance their enterprise OCM Maturity from Level 1 to Level 3. The client was planning to improve maturity by precisely this amount over the next four years, so it served as good data for him to use to help justify further investment in OCM.

### **Increase Pull From the Top**

We have found that when executives:

- Understand what structured OCM is (it's mostly about risk identification and risk mitigation – much more than just communications and training)
- Have an Awareness as to Why the organization needs it.
- Have the Desire to become personally involved, and engaged in OCM.
- Have some Knowledge of their sponsorship role in OCM.

Then you can feel some pull for OCM from the top of the organization.

## PROJECT TEAM



**MERYL ROSENTHAL, MANAGING PRINCIPAL.** Meryl is CEO, co-founder, and chairperson of the Board for FlexPaths. FlexPaths is a human capital firm that, for nearly two decades, focuses on bringing future of work innovation, inspiration, and agility to workplaces and their people through top notch thought leadership and implementation. Meryl oversees the firm's practices areas: workforce planning, workplace reorientation, and talent development/engagement and a full-service team of experts who have corporate experience and deep expertise in consulting and implementing practical solutions and plans. Prior to co-founding FlexPaths she spent 20 years in the financial services and insurance industry in P&L, strategic planning, and corporate roles, including serving as president of a highly regulated federal trust company. Meryl's role in this engagement was to provide strategic guidance and institutional knowledge. [www.linkedin.com/in/merylrosenthal](http://www.linkedin.com/in/merylrosenthal)



**RANDY KESTERSON, PROJECT LEAD/CHANGE MANAGEMENT EXPERT.** Randy offers 30+ years of experience in executive roles and in change management consulting, helping corporations plan and adapt to new workplace structure, processes, skills and competencies, and culture. He excels at coaching executives and project leaders about change and communicates effectively with all levels within an organization. He demonstrates strong skills in workshop facilitation, change management, understanding corporate financial issues and works effectively with leaders and cross-functional teams. He is certified in LaMarsh Managed Change™ and Prosci ADKAR® methodology. His roles have included VP level positions within multiple international organizations as well as advisory roles at organizations including Bank of America, US Department of Commerce, State of North Dakota, Dow, Danaher Beckman Coulter, Wilbur-Ellis, Ford Motor Company, Abbott Labs, Caterpillar, Coty, Ultragenyx, Pfizer, Maersk APM, United States Air Force, Virginia Tech University, Western Governors University, Ultra Herley Electronics, Johnsonville Foods. Randy led and implemented this OCM project. [www.linkedin.com/in/randykesterson](http://www.linkedin.com/in/randykesterson)