



Navigating Change in your Organization with Finesse

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You will learn

- ▶ Key concepts to consider when change must occur
 - Ways to handle the technical side of change
 - Ways to handle the emotional side of change
- ▶ Methods that take into account your practice's unique dynamics to handle change with finesse

Why consider a change management model?

- ▶ Need for a common language and approach
- ▶ A map
- ▶ A way to think through what is occurring during change so that we can respond appropriately
 - Technical response
 - Emotional response

Technical side of change (Kotter)



Case study: Technology tension

- ▶ The leader's role during the eight steps of change
 - What works
 - What does not work

CASE STUDY INTRO:

- ▶ There is "a little apprehension" with the employees who will be using a new general ledger software. This software will allow the department to respond to increasing requests for information that the current system just can't produce without some "work arounds." Additionally, the new system is scalable, meaning its capability can grow as the needs change.

Case study: Technology tension

- ▶ You are hearing a lot of “buzz” from employees who are concerned about the following:
 - The “go to” people for the existing system don’t see the need to make another change
 - They are going to be ignored
 - No one will listen to their concerns
 - The new system will discount the years of experience, because it is dated experience
 - The system will create reports they don’t trust
- ▶ However, you are convinced that once this new system is implemented, it will make everyone’s life easier and provide the information required.

You are the manager. How do you guide this change?

Emotional side of change

ENDING

▶ Letting go

- Saying goodbye to the known
- Loss of identity
- Leave behind "the way things were"
- What is ending?
- Who stands to lose something?
- What do they stand to lose?

NEUTRAL ZONE

▶ Chaos

- Out of control
- Unknown
- Disorienting
- Unsure of risk and competence
- Confusion
- Creativity may come to the surface
- Innovative ideas emerge

NEW BEGINNING

▶ Renewal

- Know and support new direction
- Accept change
- New chapter opened
- People are energized

Equation

change + human beings = transitions

There is no way to avoid it. But you can manage it. And if you want to come through in one piece, you must manage it!

Part two of case study

- ▶ The leader's role in times of transition
 - Before the transition
 - During the ending
 - In the neutral zone
 - During the new beginning
 - After the transition

In conclusion, finesse comes from

- ▶ Understanding the technical and emotional side of change
- ▶ Anticipating what your team will need to know
- ▶ Active leadership engagement in the entire process



THANK YOU!

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