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Leading People Through Business Changes

The Business Case

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tion stress—too many initiatives chasing after scarce resources. While at the surface there is a high degree of activity focused around implementing all of these strategic business changes, often simultaneously, the success rate is in fact, quite disappointing. The research shows the sub-optimized or failure rates for all types of strategic change is at 70% or higher. Although many organizations are quite competent at getting these business changes

installed—meaning they are up and running, they fail to get the changes fully implemented. There is no behavior change, or the behavior is adopted for only a short time. It's what we call Installation versus Implementation. Is it because the strategies aren't right? Is it a problem with technological integrity? Does the organization lack the capacity to innovate? Is it because the new processes really aren't best practice?

Simply put, to a large extent organizations just don't apply business-discipline and rigor for managing the human elements of complex, large-scale change. While organizations know many of the right things to do, implementation is still spotty. The Accelerating Implementation Methodology (AIM) addresses this significant organizational need – not as a silver bullet, not as a theoretical approach, but as a structured process that is laid on top of the project ▶

management structure and plans. It is project management for the people-side of implementation, with deliverables, tools, and measurement assessments that enable the organization to apply process where there has been none. And like any well thought-out process, AIM deliverables are planned, managed, and measured, just as the organization manages the financial and operational components of its business.

Applications of AIM

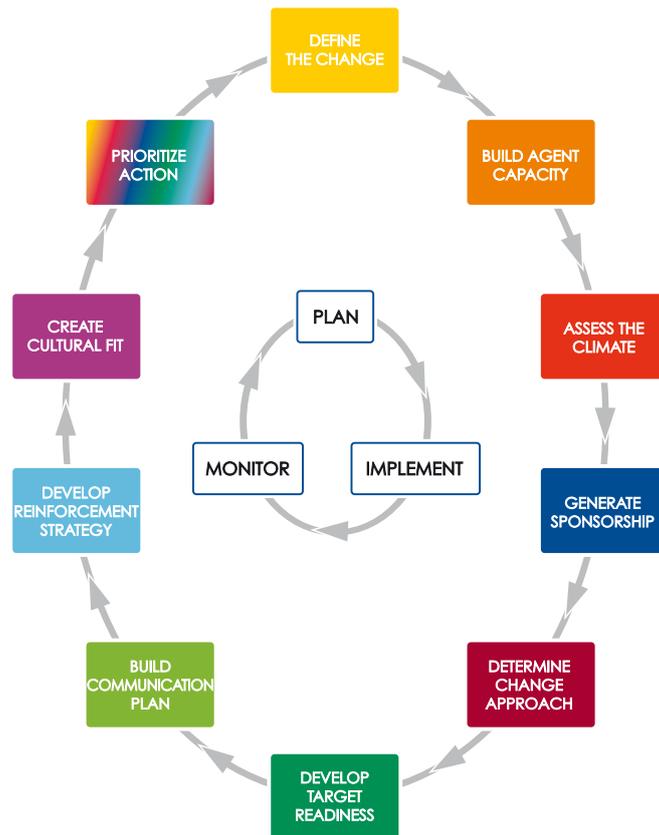
Over two decades, AIM has been applied to a diverse set of complex business initiatives with a proven record of business results. These initiatives represent a spectrum of transformational change examples:

ERP and Other Technology Changes:

Getting new technology up and running (installed) is critical, but it's not enough to ensure Return on Investment. Most technology implementation failures aren't a question of the integrity of the technology; most fail because they lack the necessary purposeful focus on user adoption.

AIM was used to facilitate a \$70 million global SAP system implementation at a major pharmaceutical corporation. This involved a significant culture shift into new technology and a complete reengineering of jobs to align with the SAP initiative. The AIM process played a key role in this successful, intensive rollout including planning, implementing, and monitoring the process. The project was implemented on time and under budget.

There is a sound reason behind the successes. The methodology is systemic. And each step of the AIM road map addresses a likely barrier. AIM serves as a robust planning tool that can be "unbundled" for high-leverage execution, enabling organizations to utilize best practices.



Quality and Business Process Improvement:

The potential ROI for a successful Six Sigma effort is staggering. The logic for pursuing a Six Sigma culture is excruciatingly self-evident. Yet the deployment challenge is difficult and complex. Predictably, despite its rock-sturdy business case and piqued executive interest, Six Sigma is susceptible to the same implementation barriers that all major change initiatives face. Yes, the same barriers that cause 70% of major change efforts to sub-optimize – no sustained executive commitment, no leadership alignment, resistance to change, poor communications, no reinforcement, resource problems, etc. In a survey of more than 240 Six Sigma practitioners across industries and around the globe, 90% of the respondents rated “the addition of a structured tool set for engaging frontline managers and employees as a top priority to help improve Six Sigma results.”

AIM's structured approach and tools can be overlaid on top of Lean/Six Sigma to increase the likelihood of successful deployment. Each step of the Roadmap addresses a likely deployment barrier. Assessment tools can be used to collect data identifying the causes of the barriers. Further, the steps can be “unbundled” for high leverage execution and speed.

Mergers and Acquisitions:

“Same bed, different dreams.” Creeping changes, uncertainty, and anxiety that lasts for months is debilitating and immediately drains value from an acquisition. AIM is speed-focused and helps identify potential barriers to the change, enabling quick implementation with limited resources. The AIM process also includes data-driven tools that allow you to measure predictable data points in the integration process, such as resistance, Change Agent capability and leadership.

Because of its practical nature, its accessibility and mass appeal, AIM provides a “how to” process that all members of an organization can utilize and believe in. These factors make AIM ideal for large-scale organizational change including mergers and acquisitions.

Innovation and Other Cultural Changes:

By its very nature, cultural changes are enterprise-wide and bring their own particular dynamic of implementation complexity. The complexity lies in the tension point that exists between the status quo (i.e., organizational silos) and the desired state (i.e., horizontal organizations). It is the cruelest of ironies that many organizations pursue cross-functionality in a silo'd way. They view each initiative in isolation, rather than in the context of total organizational change (i.e., the cross functional change agenda or portfolio).

The implementation approach must address the predictable barriers to enterprise-wide execution, it must be scalable and replicable, it must be practical and customizable, and it must be systemic. If it does not meet this criteria it cannot address the complexity inherent in multiple cross-functional change nor achieve on time, on budget, to specification project results.

AIM's data-driven tools allow you to first measure the particular strengths and weaknesses that will be encountered when multiple enterprise-wide initiatives are deployed. Secondly, it provides the structure to develop the strategies and tactics to mitigate implementation barriers and leverage the strengths.

The Methodology – It's a System

AIM is systemic – it should become part of the culture of the organization, the way business is done



AIM is systematic – it is an integrated system of principles, tactics, tools, and assessment. AIM is practical – it is operationally-focused on what to do, based on 30 years of – field research. AIM Roadmap

AIM is business-driven – it's grounded in research, but translated into business-application language and methods

The AIM Roadmap depicts the 10 principles in its cyclic form:

Keep in mind that although the Roadmap shows the steps occurring in a linear fashion, the reality of complex change is that steps are repeated, or may occur in a different sequence. The methodology is in essence a tool-box that can be applied as needed.

Each step of the methodology is integrated with deliverables, tools, and tactics, and serves as a "risk dashboard" that should be monitored throughout the project life-cycle. Its simplicity and color-coded component steps make it easy to use and accessible, yet it is sophisticated enough to meet the requirements of the most complex changes:

Define the Change

Most major changes are approved through development of a financial business case, but this business case is rarely translated into a simple and compelling statement that's used to create alignment around the change. In our 20+ years of working with global clients, we have found that the lack of a clear, compelling change definition is perhaps the most sub-optimized step in the entire system. Too often, there is a dangerous assumption that all organizational members have the same perception of the outcomes to be produced.

The Business Case for Action is the deliverable and answers these three critical questions: What is changing? Why is it changing? What are the consequences if we don't succeed?

The Project Overview Tool goes beyond the typical project charter document to identify minimum critical requirements for successfully initiating a change. Outcomes and corresponding measures are defined.

Build Agent Capacity

We recognize that all implementation takes place at the local level. This means that successful implementation requires an identified group of Change Agents who have accountability for the implementation. Most important, projects must have Change Agents with the required competencies, and they must be distributed sufficiently across the impacted areas of the organization.

The AIM system offers action learning programs to support Change Agent competency development. (Introduction to AIM or the Project Planning Workshop for intact teams)

As further support, the Change Agent Assessment Tool can be used to select Change Agents with the right skills and personal characteristics, assess competence of current Change Agents, and pinpoint needs for additional training and motivation.

Assess the Climate

How many major changes can an organization implement at the same time?

The climate for change is determined by the organization's implementation history (past patterns that are likely to be repeated barring some intervening factor), and the current level of stress (how many initiatives are competing for scarce resources.) Knowing the climate helps us to see where there are opportunities for acceleration. Change leads to disruption and stress. We can predict that the greater the stress, the higher the likelihood for implementation failure, and therefore, the greater the need for a structured approach.

The Organization Change Stress Test provides a context for understanding the climate in which future changes will occur. Organizations can then better determine sequencing and prioritization for major changes.

The Implementation History Assessment measures perceptions of past patterns of implementation results, since these same patterns are likely to be repeated. Managers typically will use the same strategies in the future that they have used in the past, unless a conscious effort is made to understand the patterns and impacts of past implementation practices. The data output is used to determine new strategies for overcoming identified barriers to implementation.

Generate Sponsorship

Leaders don't necessarily realize that they control the pace of change in the organization. The most effective leaders understand that real change is accelerated when what they say, do, and reinforce are all aligned around commitment to the change. Project teams must focus on creating this level of commitment at the beginning, middle, and end of major changes in order to get to full implementation.

AIM provides specific strategies and tactics for generating durable Sponsorship through use of Key Role Maps, the Sponsorship Assessment tool, and application of a very specific Sponsor contracting process.

Determine Change Approach

Any aspect of a business change can be approached either as being compliance-driven or commitment-driven. Neither is right, or wrong, but understanding the nature of the change from the Frame of Reference of others is critical. For example, if the change involves legal requirements, there is no choice about acceptance. On the other hand, elements of a change may require winning

"hearts and minds". Sponsors must understand the difference between compliance and commitment, and which tactics are appropriate for each approach.

Develop Target Readiness

One of the mistakes organizations make is waiting far too long to start to build readiness for a business change. Resistance is inevitable, and it's a function of the level of work disruption – how many things are going to be different as a result of this change, and not whether a change is perceived to be positive or negative. It's not logical, and it can't be wished away. There are, however, pro-active steps organizations can take to identify the likely sources of resistance so that it can be better managed.

By building a Readiness Strategy using data from the Individual Readiness Assessment and impact mapping you can identify appropriate tactics and strategies so that resistance doesn't slow you down.

Remember you can either invest in Readiness or pay for it later with resistance!

Build Communication Plan

A communication plan is not the same thing as an implementation plan. Too many organizations invest in top-down, one-way communications that don't focus on influencing behavior change. The AIM methodology centers communication efforts on communicating the right message to the right audience using the right vehicles, and always includes a feedback loop to gather reactions to both content and process.

The Communication Audit can be used at various stages of the implementation to measure progress as the Targets of the change experience "unfreezing", the "transition state", and "re-freezing". AIM tools also include a Communication Planning Template to identify the ap- ▶

appropriate vehicles for delivering messages to Target groups.

Develop Reinforcement

Strategy

One of AIM's core principles is that there is no behavior change unless you change the reinforcements. A best practice Implementation Plan must include a Reinforcement Strategy that aligns reinforcement mechanisms with the new performance expectations. "Reinforcing" Sponsors must apply immediate rewards and negative consequences based on observable behavior of their direct reports. In addition, Reinforcing Sponsors can provide reinforcement by making old ways more difficult to use and the new ways easier.

The Targeted Reinforcement Index identifies areas of alignment and can be used to develop strategies that focus the right reinforcers on those behaviors needed to implement a new way of operating.

Create Cultural Fit

The consistency of the change with the current corporate culture can predict the probability of implementation success. Culture is extremely powerful ("the way things are done"); if a change does not align with cultural values, the organization can either "change the change" or "change the culture." Note that cultural change is a multi-year process requiring enormous organizational resources. Organizations

that lack durable Sponsorship for the culture change are doomed to implementation failure.

Prioritize Action

Project teams must develop an Implementation Plan that is integrated with the technical project plan. How the AIM steps are applied, the sequence, and the deliverables that are selected depends on many factors. The Implementation Risk Forecast pinpoints likely barriers prospectively so that appropriate plans and strategies are put in place to mitigate risk. At a minimum, the Implementation Plan must include a Business Case for Action, and Sponsor, Readiness, Reinforcement, and Communication strategies.

The AIM toolkit also includes an Action Planning Guide that supports the development of the Implementation Plan.

Action Learning Integrates with the System

The AIM elements, deliverables, tools and tactics are complemented by a series of Action Learning programs designed to teach core AIM principles with an operational focus. Programs are offered in a continuum of learning from building awareness through Accreditation in the methodology.

While each program stands on its own in delivering return on investment, maximum value is derived when AIM is applied in a purposeful way, integrating tools, learning,

measurement, and methodology knowledge transfer through the Accreditation process.

Sample programs include:

Executive Briefing:

Provides senior executives with a basic understanding of AIM as Sponsors of change. Participants discover the advantages of using a structured approach to change, and AIM proprietary assessment tools are employed to pinpoint inhibitors and identify leverage points to accelerate implementation. The length and exact content are customized to fit the client's expectations and desired outcomes.

Introduction to AIM:

Two-day awareness program for Change Agents and Sponsors representing multiple projects across the enterprise (offered publicly and on-site). Introduces core principles, vocabulary, and tools.

Project Planning Workshop:

Three-day working session for an intact project team to create understanding of the core principles and develop basic deliverables, including a Business Case for Action and a high-level Sponsorship, Readiness, Reinforcement, and Communication strategy for a current, real-world project.

Accreditation:

Intensive working session to prepare a core group of Change

Agents and Sponsors to become internal Practitioners of AIM. This is a four-day session to transfer capability to apply AIM to organizational business change projects and programs.

Sample Industry Applications:

Healthcare

- Electronic Medical Records Implementation
- Care Delivery Transformation
- Compliance Requirements such as ICD10
- Continuous Improvement

Pharmaceuticals

- Clinical Process Improvement
- R&D Process Changes
- Re-structuring
- Lean/Six Sigma
- ERPs
- Integration of Acquisitions

Retail

- Re-structuring
- Supply Chain Process Improvement
- Succession Planning

Oil and Gas

- New technology
- Quality and Safety
- Business Process Improvement
- Innovation

High Tech

- User adoption for new technology
- Innovation
- New product launches

Financial Services

- Business re-structuring
- New technology
- New service offerings

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