

Change Management Success Principles

Brad Cleveland

Customer experience (CX) transformation is characterized by continuous improvement and change. However, as a discipline, CX isn't defined by a single methodology that guides all activities. Far from it. Talk to 10 experienced practitioners and each will share their own secret sauce—often with great conviction. (Tools and methods are CX geeks' equivalent of politics—don't be surprised by passionate debates.)

So, let's simplify this discussion. There are three main categories of activities you'll need to address. (My goal is not to cover methodologies in detail, but to offer recommendations on how to approach this whole area from a leadership perspective.) The three areas are:

Change management. Customer experience initiatives involve guiding the organization through complex and never-ending change. Change management is largely focused on the people aspects of change. It centers around ensuring that employees understand, embrace and successfully adapt to changes. Prosci's ADKAR® Model and John Kotter's Leading Change Model are common approaches. And governance is an important part of change management. Change management is distinct from and overarching to process improvement and project management.

Change management has always suffered from an identity crisis. IT professionals talk about change management in terms of rolling out new versions of software. Here, we're referring to the people side of change management. Both are necessary and should not be equated.

Process improvement. Your team will need effective methods to guide ongoing diagnosis and improvements to processes. In any CX initiative, process improvements are plentiful, diverse and ongoing. Examples include the ongoing adjustments and improvements to apps, websites, communication, forecasts, quality standards, reporting, knowledge management, and many others.

Bring on the alphabet soup—Lean, DMAIC, Six Sigma, Kaizen and others. Many tools that have been around for years remain indispensable: flow charts, cause and effect diagrams, statistical control charts and others. There's no need to reinvent the wheel. The key as leader is to ensure your team uses a methodology and tools that get things done. As your CX initiatives grow, your process improvement toolkit will expand. It's helpful for CX practitioners to be adaptable—your team is working across functions and often within activities that are already underway.

Project management. Your team will need an approach that keeps projects on track and within budget. Typical examples of CX projects include evaluating and implementing new technology, significant redesign of a cross-functional process, or creating a new CX-oriented workshop curriculum. In many organizations, larger projects are managed by dedicated project managers.

It is helpful to adopt a go-to approach for managing projects. Examples include Project Management Institute® standards and JPACE. The rigor in these methodologies can boost project success and reduce confusion and uncertainty. The one caveat is that one size does not fit all—you'll need to find a balance between too little and too much project management. There's managing and there's doing, and you'll want the right amount of both.

Recommendations

Here are some recommendations that relate to all three areas (change management, process improvement and project management):

First, ensure your team uses methods that are appropriate to the task at hand. You may want to carve out time to get briefed by your team on the methods being considered. Get their help in making a good call.

- Find a balance between A) allowing anyone in any area to use any tool, and B) mandating a specific approach. A middle ground with a sensible mix of tools is where most land.
- Look for opportunities to develop expertise within your organization. You'll likely have individuals who have the golden combo—they are experienced with tools, understand projects and processes, and are good with people. Hang on to them! Get their help to deepen know-how across teams and activities.
- Different approaches often take root in different areas, and that's not necessarily a bad thing. Some tools are better suited to some activities (e.g., software development teams often use DevOps or agile). My encouragement is to be intentional when deciding if and where to allow different approaches.
- The proof is in the eating of the pudding. Hang on to methods that work, and make adjustments in those areas that chronically get stuck or go off track.

The overall message here is to not to reinvent the wheel. If you have a team of certified project managers, use them. If your organization has previously adopted lean methodologies, take advantage of that experience. When employees struggle to keep up with changes, settling on and using familiar tools can save time, boost confidence, and reserve mindshare for customer-focused work. And remember Nike's slogan ("Just do it!"); time spent ruminating over models is time you're not spending getting closer to your customers.