The Most Important Thing You Can Do to Make a Change Successful – and also the Most Neglected

Rick Maurer

Did you ever roll out a major change only to find out that hardly anyone supported you? Then, for the next few months, you found yourself working night and day trying to push this change forward? Often it felt like you were dragging people – pleading with them, threatening, or just doing the work yourself?

If you've ever experienced this (and I suspect most of us have) I think you'll find this report helpful.

Making a compelling case for change is the most important thing you can do to build support for any major new initiative. Makes no difference if it is merger integration, a reorganization, restructuring, reengineering, implementing new software, Six Sigma, whatever – making a strong case that something different is needed must come first.

Sadly, most people ignore this critical phase in the life of a change. My research shows that people who ignore or speed through this stage risk failure. Those who focus on making the case, so that people can truly understand why change is called for enjoy a higher success rate – and much lower resistance.

Typically, here's what happens. A small group of leaders see the need for a change. They look at the numbers and realize that they've got to do something now! Whatever it is – it's got to happen today! Driven by a strong sense of urgency, these leaders rush to action. They introduce plans. They make assignments. They do all kinds of things to get started. What they miss is that nobody else around them seems to see this urgent need to do something differently.

These leaders just made a huge mistake. They introduced "how" before they answered "why." They moved to action by telling people "how" the change will be planned and implemented without ever explaining "why" it was so important to do something – anything – differently.

Read on to learn how to avoid the trap of moving to ***how*** before ***why*** is answered.

Four Key Questions

1. Does your own team feel an urgency to change? If not, this is probably the place to start. Too often, an executive (or middle manager, for that matter) introduces something without getting his or her own group on board. And the place to begin is with making a case.

2. Who else must feel the urgency to change?

3. What's the gap between what they see and what you see?

4. How can we bridge that gap in order to make the most compelling case for change?

Cast a Wide Net

You need to be able to identify every one who has a stake in this change. Often, leaders make a case to a small group of people. When that group gets excited, the leaders believe that they've just earnec the support they need. And that's a mistake.

Take a moment and write down all the stakeholders *who must support you* on this change.

Consider the following:

- Who needs to be a champion for this change?
- Who needs to support it?
- Who needs to go along?

Asking these questions may cause you to cast a much wider net and find stakeholders whom you might have missed otherwise.

I was helping a group of managers in a software engineering firm debrief a project that had stalled. They told me that six months into the project, the mail room balked, and that stopped everything. While they had done a fairly good job of involving stakeholders, they completely forgot about the mail room. These types of missteps are avoidable if you just stop and ask yourself: who has a stake in this?

Mind the Gap

You can't ride the subway in London without hearing warnings to "mind the gap." That's the gap between the train and the platform.

The same goes inside organizations. You must pay attention to the gap between what you see and what others see.

List the places where your view of what's going on differs from other stakeholders.

Is it a huge gap or something small?

Does the gap occur because you have access to data that others don't see? Do you feel urgency, bu they don't? Or, are they suspicious of you and any message you bring them?

Your response to these questions creates the foundation for your strategy to bridge this gap and make a case.

Bridging the Gap

Here's what you can do.

You must make sure that people know that something *new* is called for – and that a change is neede *today*. It is tempting to make a case by just giving people information. But that's not nearly enough. To truly make a case, you need to address three things.

1. People must understand what you're talking about. (I call this Level 1.)

2. People must feel emotionally why this change is critical. "If we don't do something, we could be out of business." (Level 2)

3. People must trust the source. If people don't trust you, they'll be suspicious of what you tell them. I this is the case, then you may need to bring in someone who people do trust. (Level 3)

One company lost a major contract to provide service to a state government. This was a big deal. If this financial loss wasn't turned around, they could be is serious trouble. So instead of parading the executives in front of the employees, as I am certain they had done many times before, they did something completely different. They invited an official from the state's contracting offer to explain why their company lost. That person had credibility and people took that message seriously.

Her message gave people information (Level 1). Her position gave her credibility (Level 3). And the evidence itself led most people to feel the potential risk (Level 2).

You should try to include all three levels any time you want to influence others. If people get it, like it, and trust you, your chances for make an effective case for change are quite good. However, if any of these are missing, you'll get indifference, inertia, and resistance. Not a good way to start a major change.

Here is a common way leaders introduce people to change. Some well-meaning leader gets up in front of the team and gives a PowerPoint presentation. This slide show is a mind-numbing display of data. As the audience looks at slide after slide after slide, crammed with dozens of bullet points and numbers, their eyes glaze over. Then their brains glaze over. They're not listening. Mark Twain once wrote that no sinner was ever converted after the first twenty minutes of a sermon.

Every day, leaders try to get people on board by subjecting them to hundreds of PowerPoint slides. It doesn't work. Repeat after me – it doesn't work. You've got to ask yourself, "why should people care after being talked to in such a boring manner?"

Making a compelling case for change is all about engaging people. The best way to do that is to build your strategy around the three levels. Make sure people get it, like it, and trust where the information is coming from.

At Level 1, make sure people have the capacity to understand what you're talking about. If they don't have MBAs in finance, and your presentations all include complex financial analyses and projections, you'll probably lose your audience before you ever get started.

Speak their language.

At Level 2, offer an emotional wallop. Urgency is an emotional thing. It springs from fear or excitement. Make sure your case taps into our natural deep-seated emotional well.

At Level 3, make sure people trust the ones who deliver the message.

And if you can't find anyone whom they trust (and that can happen), consider the following:

- Open the books so people can look at the same data that you see
- Give them opportunities to talk with people like them in other organizations who have faced similar challenges
- Give people time to mull over what you tell them
- Keep communicating in various ways

How Can You Tell That You've Made a Case?

It's not enough to simply think you've made a case; you've got to *know* that you got your point across at all three levels so that people got it, liked it, and trusted what you told them. Without that assurance, you will spend far too much time and money trying to drag people along with you.

Here are some tips that let you know that you've made a case. You see people:

- ask questions that show they are interested in what you are saying

- challenge what you are saying out of a real concern for this might mean
- suggest ways to deal with the challenge
- volunteer to help
- take leadership roles
- use first person pronouns – *I* and *we* – instead of saying *you* and *they*. For example, "We've got to do something about this, versus "So what are you going to do about this?"
- My friend, the late Kathie Dannemiller, said that she looked for "a shift." She typically worked with large groups of people, and she knew things were going well when she could feel a shift. This shift isn't always easy to define, but you can feel it.

Ways to Check

Let's say you work in a large organization and it's hard to get a good read on where people stand with regard to the change. Here's what you can do:

- Send out a very short survey. Companies such as surveymonekey.com and zoomerang.com allow you to create surveys and post them online for free. (I use Surveymonekey.com.)
    - Ask three questions tops. You'll get a much higher response rate. And people will usually take time to give you thoughtful answers.
    - So be sure to ask open-ended questions. Multiple choice or 1 to 5 scales will not give you the data you need.
    - You might ask, "Over the past few weeks, we have been attempting to show you that our company must make some major changes or else we risk going out of business. Do you share this concern? Please explain."
- Convene a few focus groups and ask people if they see a need for change. The purpose of a focus group is to learn – not to preach. So go there to listen and learn.
- Ask people informally.
- Pay attention in meetings. Let's say you thought people were on board and you began to notice planning teams struggling to find members or to get moving. These could be signs that others don't feel the same sense of urgency that you do.

I wish you well.