



# Managing through Change

## Leading @Vaxcyte



Participant Guide



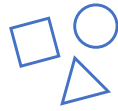
# Program Agenda & Learning Objectives

The following are our agenda and learning objectives for Managing through Change.



## Our Program Agenda

- Framing Change - for ourselves and others
- Change Management Models
- Planning for Change
- Importance of Change Networks



## Our Learning Objectives


At the end of this program, you will have a better understanding of:

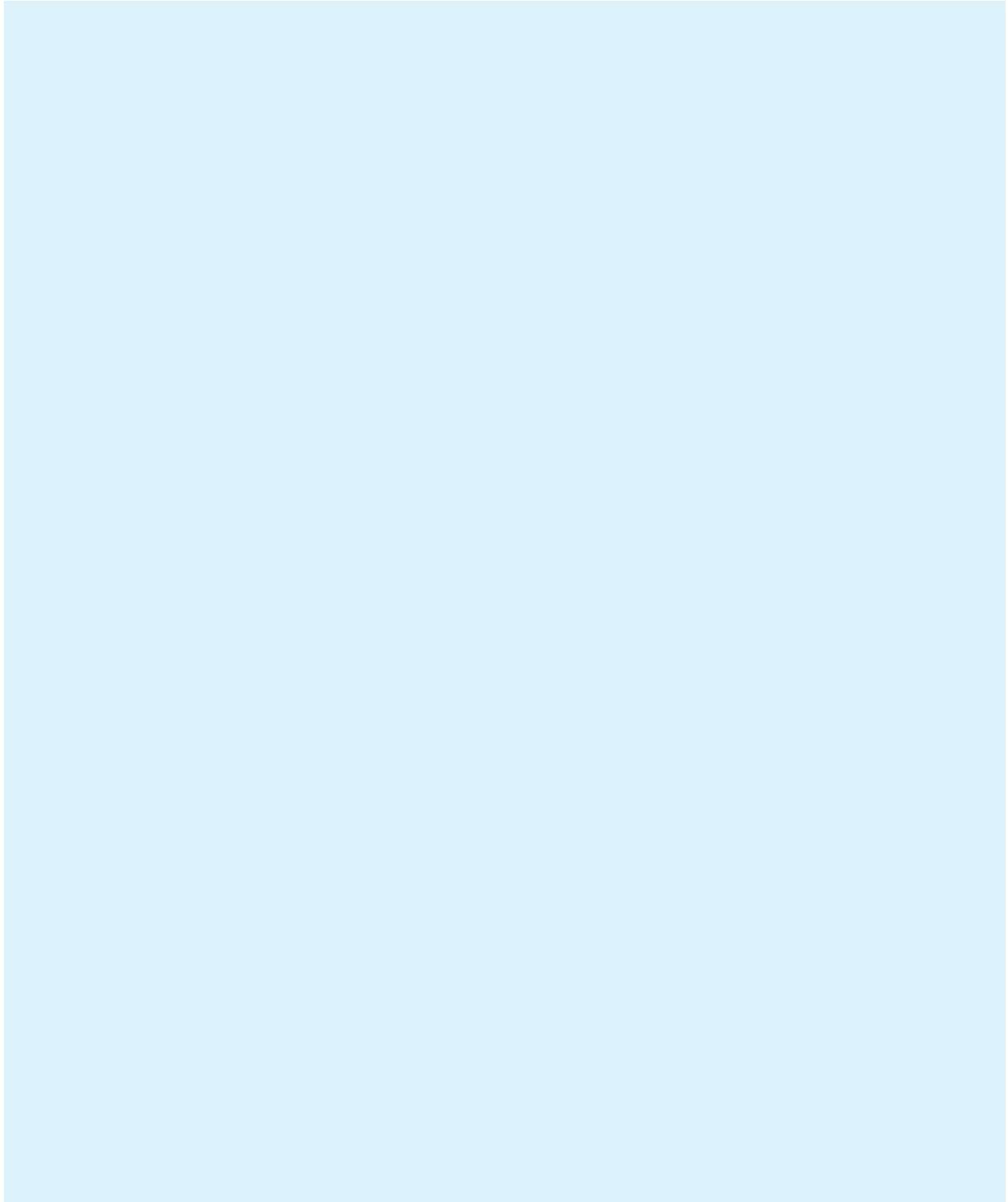
- The cycle of change and how we and others may react
- Tips / techniques for managing yourself and your team through change
- Different change management models to apply to future change efforts

My Notes:



# Why Change Can Be Challenging...

My Notes: 



# What is Change Management?

Having a shared definition of change management helps us understand the core of what we are trying to achieve and why that matters ...

The approach and steps taken are to prepare, support and help individuals, teams and organizations in making organizational change.



My Notes:



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# Why Change Management Matters ...



My Notes:

**Business change is constant and inevitable.** When poorly managed, change has the potential to cause organizational stress and costly re-work.

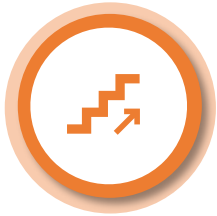
**Having a more systemic and thoughtful approach to change ensures that the people asset of an organization is not overlooked.** As changes occur, change management helps employees understand their roles and how they work now in light of the change.

**Change management also enables future company growth** by allowing the organization to remain dynamic in its marketplace.

# Different Types of Change

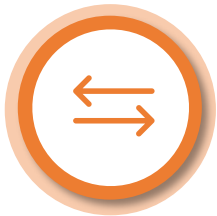
Change management can be used to manage many types of change:

My Notes:



## **Developmental change**

Any organizational change that improves previously established processes and procedures.



## **Transitional change**

Change that moves an organization away from its current state to a new state in order to solve a problem, such as mergers and acquisitions, automation, etc.



## **Transformational change**

Change that radically and fundamentally alters the culture and operation of an organization. In transformational change, the end result may not be known. For example, a company may pursue entirely different products or markets.

# What are Possible Sources of Change?

There are different sources of change. Understanding the source of the change also helps you define a better change plan ...



- 1 New function
- 2 Changing organizational design
- 3 New or updated system
- 4 New or updated process
- 5 New or updated products / services
- 6 New customers
- 7 New partners
- 8 New markets

**Change Management** is a collective term for all approaches to prepare, support, and help individuals, teams, and organizations in making organizational change. Drivers of change may include the ongoing evolution of technology, internal reviews of processes, crisis response, customer demand changes, competitive pressure, acquisitions and mergers, and organizational restructuring. It includes methods that redirect or redefine the use of resources, business process, budget allocations, or other modes of operation that significantly change a company or organization. Organizational Change Management considers the full organization and what needs to change, while change management may be used solely to refer to how people and teams are affected by such organizational transition. It deals with many different disciplines, from behavioral and social sciences to information technology and business solutions.

In a project-management context, the term "change management" may be used as an alternative to change control processes wherein changes to the scope of a project are formally introduced and approved.

# Change Management in our VUCA World

Change is constant and understanding that is an important first step ...



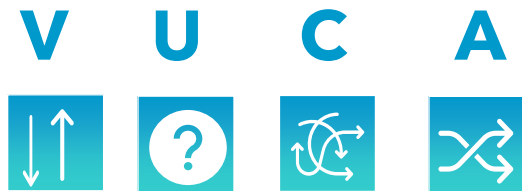
**Volatility** - change is rapid and unpredictable in its nature and extent.

**Uncertainty** - the present is unclear, and the future is uncertain.

**Complexity** - many different, interconnected factors come into play, with potential to cause chaos and confusion.

**Ambiguous** - there is a lack of clarity or awareness in situations.

## Thriving in a VUCA world...



**Demands excellence in change management as a continuum.**

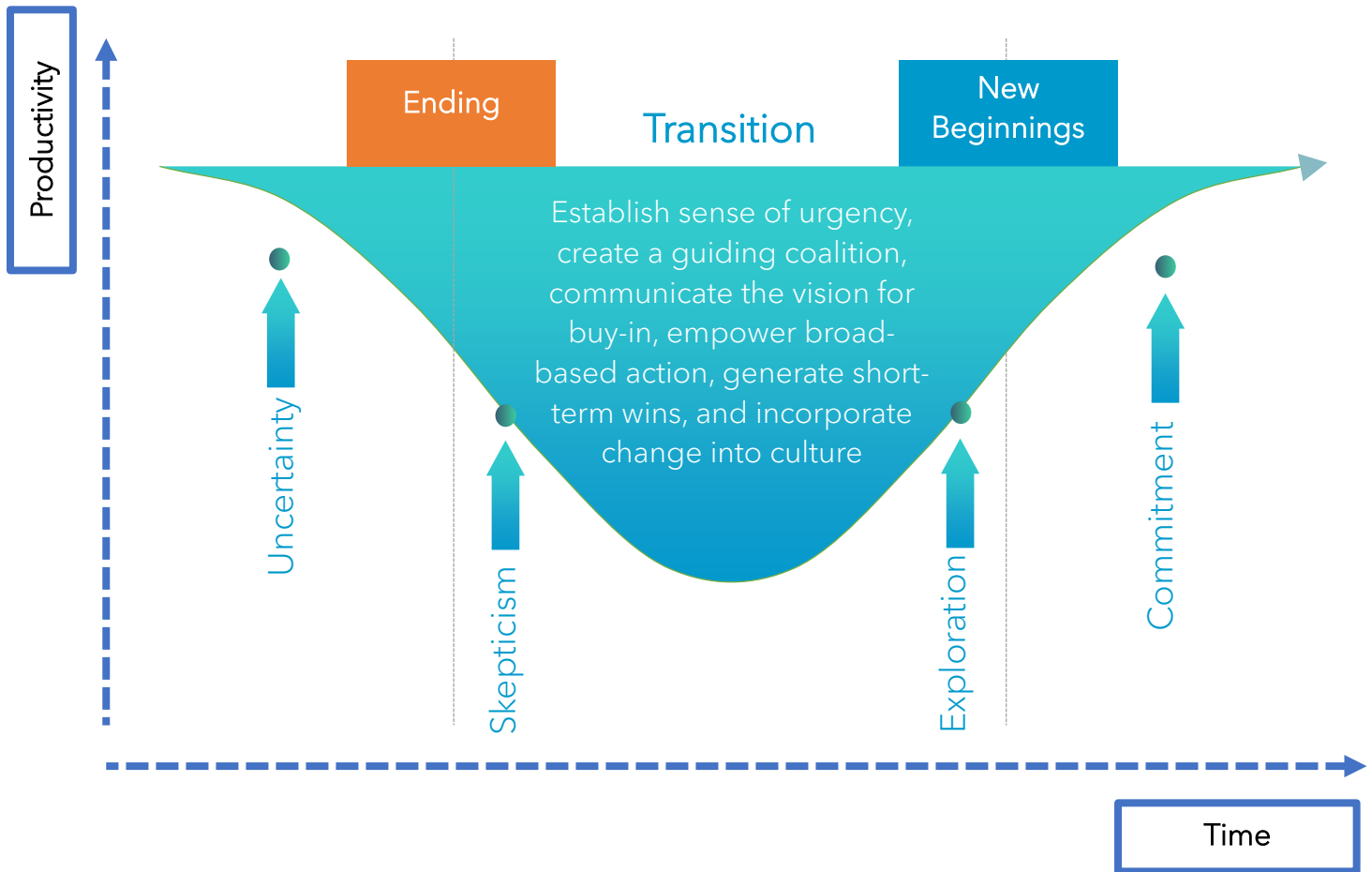
My Notes:






# Change Transition Curve

Research over many years, many different industries, and regions in the world show a common theme when people transition through change ...



My Notes: 

# Considering Change Transitions

Use the following to consider a change you've either been a part of or otherwise witnessed:

## Examples:

Uncertainty	
Skepticism	
Exploration	
Commitment	

# Change - Post-Mortem

Use the following to consider a past change you've experienced at work

What was the nature of the change?

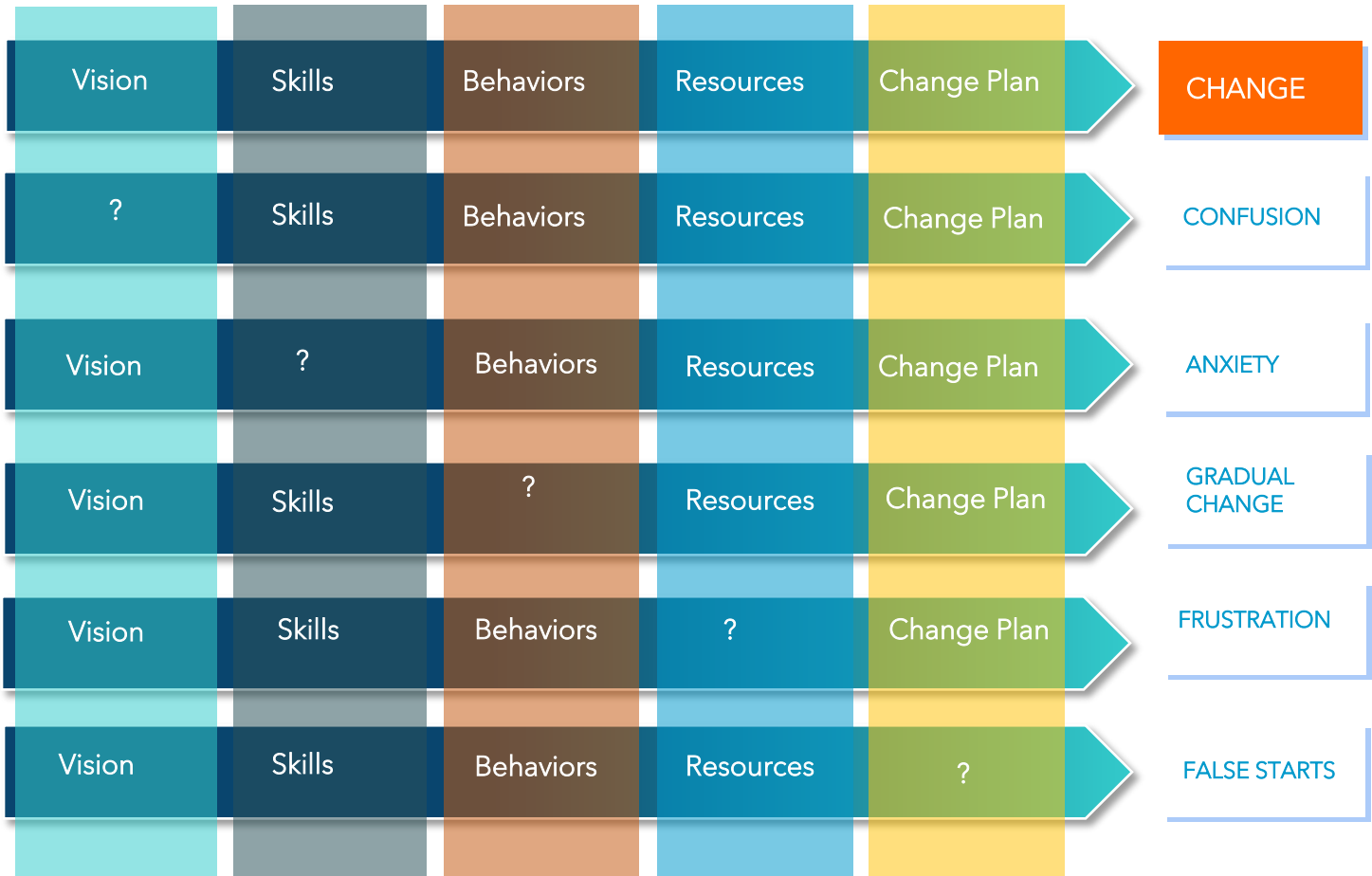
What could have been done better?


People clearly understood why this change was occurring and why it needed to happen	
The change, its nature, reasoning, and potential impact were clearly communicated to all and early on in the process	
People were informed early on as to the potential impact to them	
People were informed early on as to the potential benefit to them	
All people who were involved clearly understood their contribution / their role in the change	
There was a safe and accessible forum(s) for people to pose their questions	
It was accepted for people to initially convey their concerns or angst	

# Many Fundamentals Should Align

Many fundamentals should align at the same time in order for change to be successful

...



My Notes: 

# Aligning Key Elements for Change

Use the following to consider the past change effort you experienced

	What was needed for the change?	What could have been better to support the change?	Other notes:
Vision			
Skills			
Behaviors			
Resources			
Change Plan			

# Notes

My Notes: 

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# Phases of Change

Understanding how to productively manage change can significantly influence not only positive outcomes from change, but also increase effective assimilation and adoption ...

My Notes:

**1** **Establish sense of urgency**  
We start with understanding where we want to be. We can create a sense of urgency to change - what is the value in changing.

**2** **Create a guiding coalition**  
We then form a guiding coalition - probably sponsors, stakeholders / steering committee, partners and change team, etc.

**3** **Develop a change vision**  
We co-create a change vision with our guiding coalition.

**4** **Communicate the vision for buy-in**  
We ensure our stakeholders and those impacted by the change understand the vision and accept its importance.

**5** **Empower broad-based action**  
We empower broad-based action by communicating and educating stakeholders, partners and customers of the change (customers are typically internal) on the change itself, how it impacts them, and what they do about that, etc.

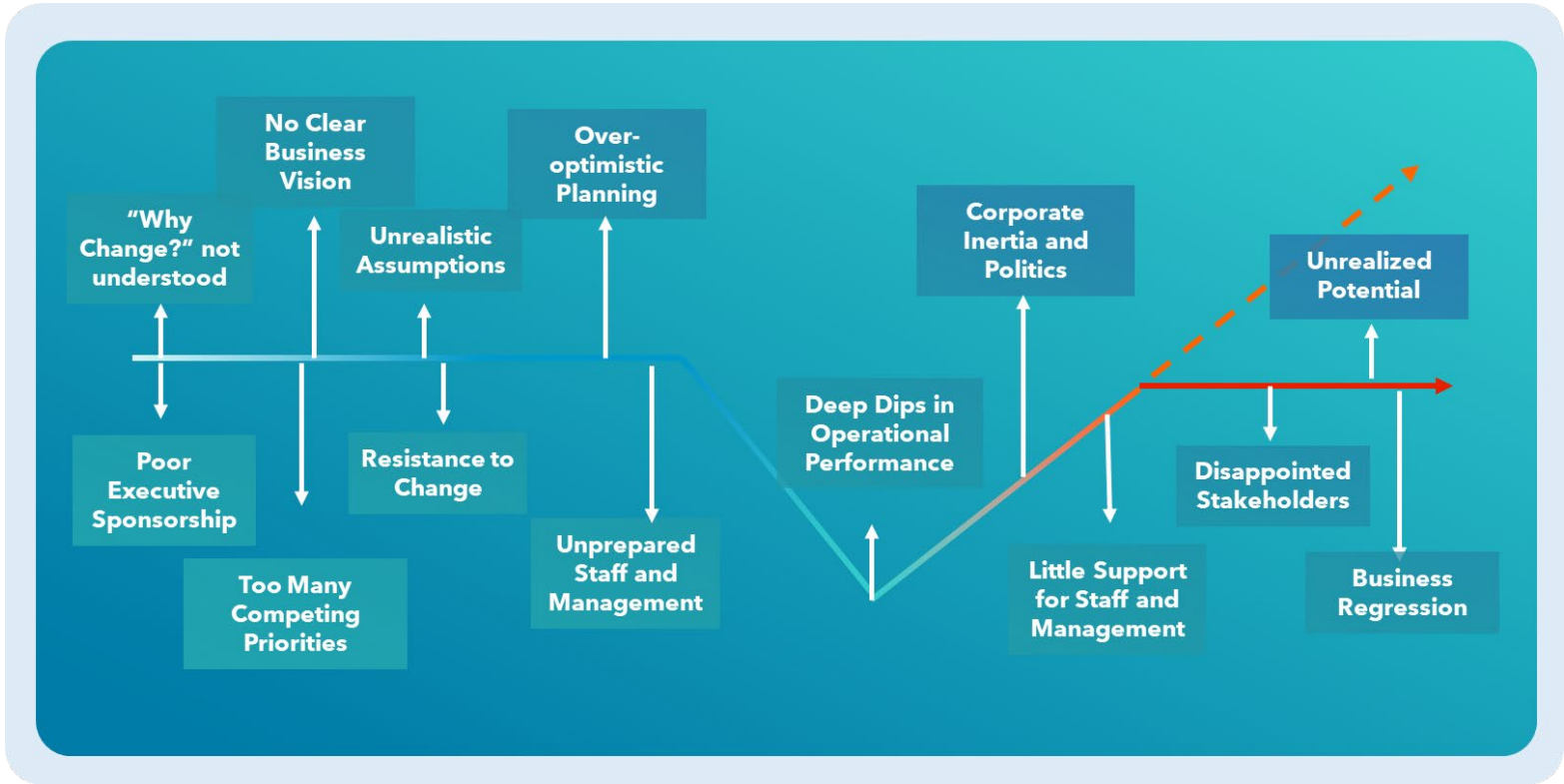
**6** **Generate short-term wins**  
Our change plan typically incorporates short-term wins, such as introducing a new system that reduces cycle time by X %, etc.

**7** **Never let up**  
We ardently pursue changes we and others believe are important.

**8** **Incorporate change into culture**  
We get very good at change the more we do this and that too starts to inculcate change competencies in our culture, i.e., we're not afraid to approach change because we know we can handle it well.

# Common Challenges Managing Change

Which one have you seen most of?



My Notes:

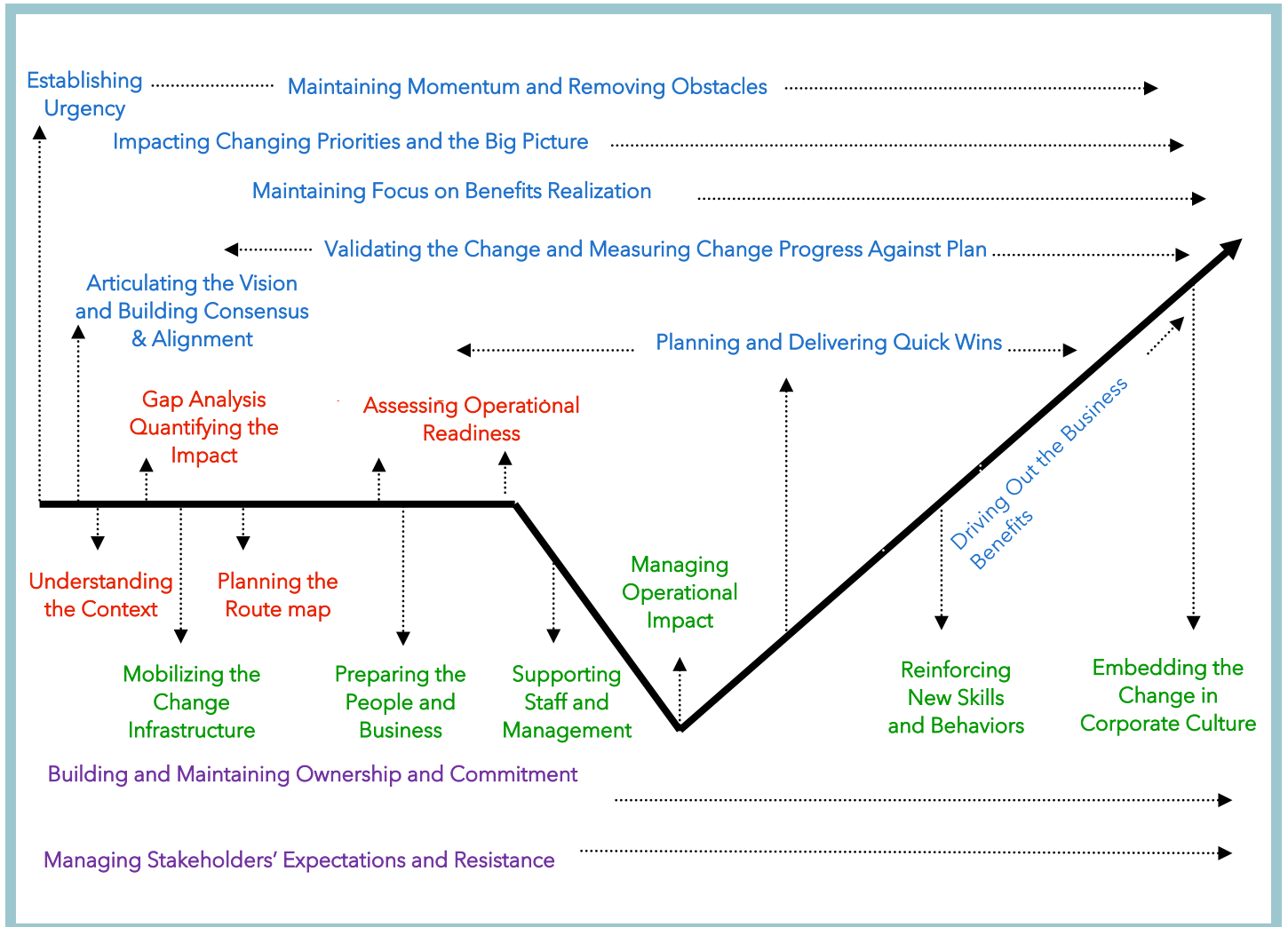


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# Consciously Managing 'The Dip'

What are steps we can practically take to consciously manage higher engagement and satisfaction during change?



My Notes:



# Consciously Managing 'The Dip'

Notes:

Establishing Urgency	
Maintaining Momentum and Removing Obstacles	
Impacting Changing Priorities and the Big Picture	
Maintaining Focus on Benefits Realization	
Validating the Change and Measuring Change Progress Against Plan	
Articulating the Vision and Building Consensus and Alignment	
Planning and Delivering Quick Wins	
Driving Out the Business Benefits	

# Aligning Others to Change

Use the following to consider a change you're working on now or soon:

**Title of change effort:**

**Purpose of change:**

Notes:

1

Who do you need to align with this change?

2

What might they deem as a threat to them?

3

How might you proactively address any potential threats?

4

How would you describe the benefit of change to these individuals?

5

How would you describe the role and contribution these individuals need to play?

# Tips for Leading Others through Change

## How to lead a team through change

Here are several ways to lead through change:

### 1. Assemble a strong leadership team ahead of time

Before a major company change, it can be helpful to evaluate the leadership team and identify necessary changes. Consider assembling a change management team of trustworthy individuals who are familiar with adapting to change in their careers. These individuals may also provide new ideas that help encourage effective professional progress.

### 2. Bring in outside help

For major company-wide changes, consider bringing in a consultant who specializes in transition management to help make the process smoother and more efficient. These major changes may include:

- Mergers
- Acquisitions
- Leadership changes

A consultant can identify potential challenges and help address them with proven strategies.

### 3. Recruit from within

During times of change, you may identify new opportunities within the company. Effective leaders may take this opportunity to reward hard-working individuals with promotions, thus filling those positions from within the company. Internal promotions show faith in the internal team and emphasize opportunities for growth to other team members. This can help restore trust and help team members feel secure in their jobs.

### 4. Make a plan

It may also be useful to collaborate with a leadership team to develop a thorough strategic plan. Consider including the following elements:

- Clear short-term and long-term goals
- Organizational charts
- Timelines or expected dates of major changes
- Tangible, strategic steps the company is taking

Ensure all leaders are comfortable with the strategic plan and consider meeting with the change management team regularly, possibly once a month, to revisit the plan and make any necessary adjustments or updates.

### 5. Designate a spokesperson

Designating a spokesperson for a major change can help team members feel like the company is listening to their ideas. This point person attends status update meetings and remains knowledgeable on all components of company changes. They serve as the primary contact for all questions about changes, policies and procedures.

### 6. Hold a meeting

For major changes, especially those affecting the entire company, consider holding a company-wide meeting to introduce the changes. This can allow everyone to receive news at the same time, which helps ensure everyone receives the same information. The meeting can include:

- Specific areas or policies that are changing
- Areas that are staying the same
- Decisions that are final
- Decisions that are still in the consideration process
- How the changes may affect each team member

### 7. Educate and explain

Team members can better process change when they understand why it's happening. Leaders may explain the reasoning for changes taking place and discuss team member roles in the transition. Help individuals understand the leadership thought process and end goals and consider presenting the transition as a welcome opportunity for growth.

### 8. Create a transition team

Consider creating a transition team to monitor team member's reactions, feelings and concerns about the changes taking place. This team can meet regularly and report to the change management team. They may also serve as representatives of all individuals at the company, allowing staff to feel like their input matters.

# Tips for Leading Others through Change

## 9. Prioritize

Effective leaders may decide what's most important for team members to focus on, understanding some reductions in productivity may occur. They may then help teams ensure they complete these tasks first. For instance, a leader may encourage a sales team to prioritize current accounts over potential new business.

## 10. Provide resources

Offer resources to help team members manage their emotions. This includes feelings of anxiety or excitement as the change approaches. These resources may include:

- Referrals for counselors
- Extra paid time off
- Morale-building activities

## 11. Keep operations going

Leaders may offer encouragement and guidance to help regular operations continue during a time of change. This may help team members feel like they're still contributing, even if the method of doing so differs from their regular contributions. The result may be a sense of normalcy that allows team member satisfaction and productivity.

## Tips for leading people through change

Here are some tips for what to do when leading a team through change:

- **Be honest.** While big changes can lead to uncertainty, it's often best for leaders to be honest about the things they know and the things you may benefit from understanding better. Leaders who receive challenging questions about the change can be transparent and describe how they plan to find out more.
- **Allow time for learning.** People learn differently and at different paces. Allow plenty of time for team members to master new policies, new skills or new equipment.
- **Value feedback.** Leaders may encourage open communication and provide a way for team members to voice their opinions, suggestions and concerns. This can help team members feel like their feedback is valuable.
- **Set an example.** It can be helpful for leaders to stay positive around others. Approaching a change with an optimistic outlook can help team members learn to share that positivity.
- **Empathize.** Recognize that big changes can surprise and concern team members. In response, leaders can extend kindness, patience and empathy to their team during transitions.

My Notes:



# Typical Change Management Steps

Whatever the size and complexity of the change, most change efforts follow a similar pattern of common steps:

		Notes:
	<b>Assess</b> To begin with, we need to assess the kind of changes that are the most important to our organization and have the most immediate effects.	
	<b>Prepare</b> After identifying what we need to change, we need to make all necessary preparations to inform others of the impending change.	
	<b>Plan</b> Once stakeholders are aligned, we need to make detailed plans that will make the implementation process successful and seamless. This is our Change Management Plan.	
	<b>Implement</b> Our implementation of the change will be the activation of our overarching Change Management Plan.	
	<b>Sustain</b> If the change implementation is successful, the next step is to maintain its success and continue its positive effects on the organization.	

# Gap Analysis

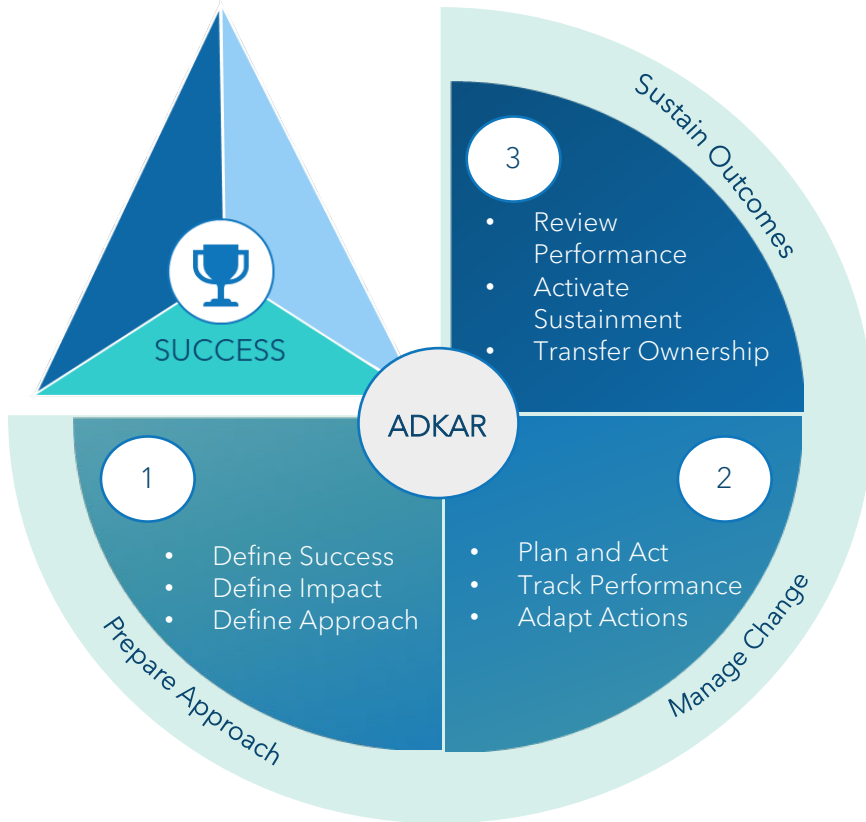
Thoughtful gap analysis helps us understand where we are today, where we want to be in the future, and the delta that lies between these two states ...

	Current State	Future State	Gap	Actions to close Gap
What	What happened	What should it look like	What is different	What will be done to address the gap
Where	Where is the confusion	Where will it change	Where will it be different	Where will it be addressed
When	When is it done	When will it change	When are the differences needed	When will it be addressed
Who	Who does the work	Who will do this	Who will identify and validate the gap	Who will make the decision and complete it
How	How is it sequenced	How will it be timed and resourced	How will the gaps be improved	How will it be rolled out

My Notes: 

# Prosci: ADKAR Change Model

## 3 Step Process



## PCT Model

Prosci Change Triangle  
Leadership/Sponsorship



## ADKAR Model

<b>A</b>	<b>Awareness</b> - of the need for change
<b>D</b>	<b>Desire</b> - to participate and support the change
<b>K</b>	<b>Knowledge</b> - on how to change
<b>A</b>	<b>Ability</b> - to implement desired skills and behaviors
<b>R</b>	<b>Reinforcement</b> - to sustain the change



# Prosci: ADKAR Change Model

	Element	Definition	What you hear	Triggers for building
A	Awareness	of the need for change	"I understand why..."	Why? Why now? What if we don't?
D	Desire	to participate and support the change	"I have decided to..."	WIIFM Personal motivators Organizational motivators
K	Knowledge	on how to change	"I know how to..."	Within context (after A&D) Need to know during Need to know after
A	Ability	to implement desired skills and behaviors	"I am able to..."	Size of the K-A gaps Barriers/capacity Practice/coaching
R	Reinforcement	to sustain the	"I will continue to..."	Mechanisms Measurements Sustainment

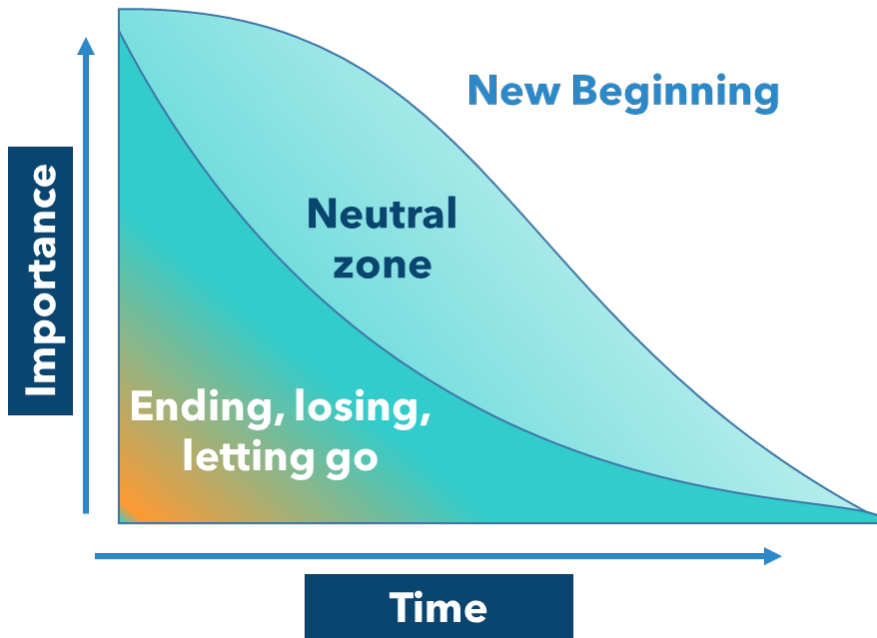
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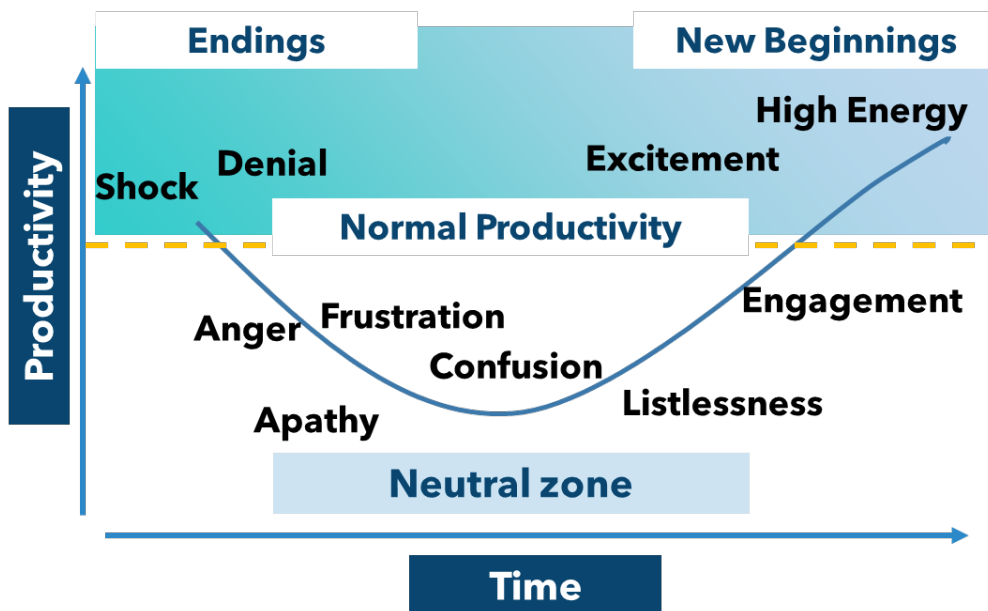
# Bridge's Transition Change Model

Supporting / not pushing people through transition. "Change is an event, but a transition is the process that you go through in response to the change." W. Bridges

## People are supported through 3 Phases



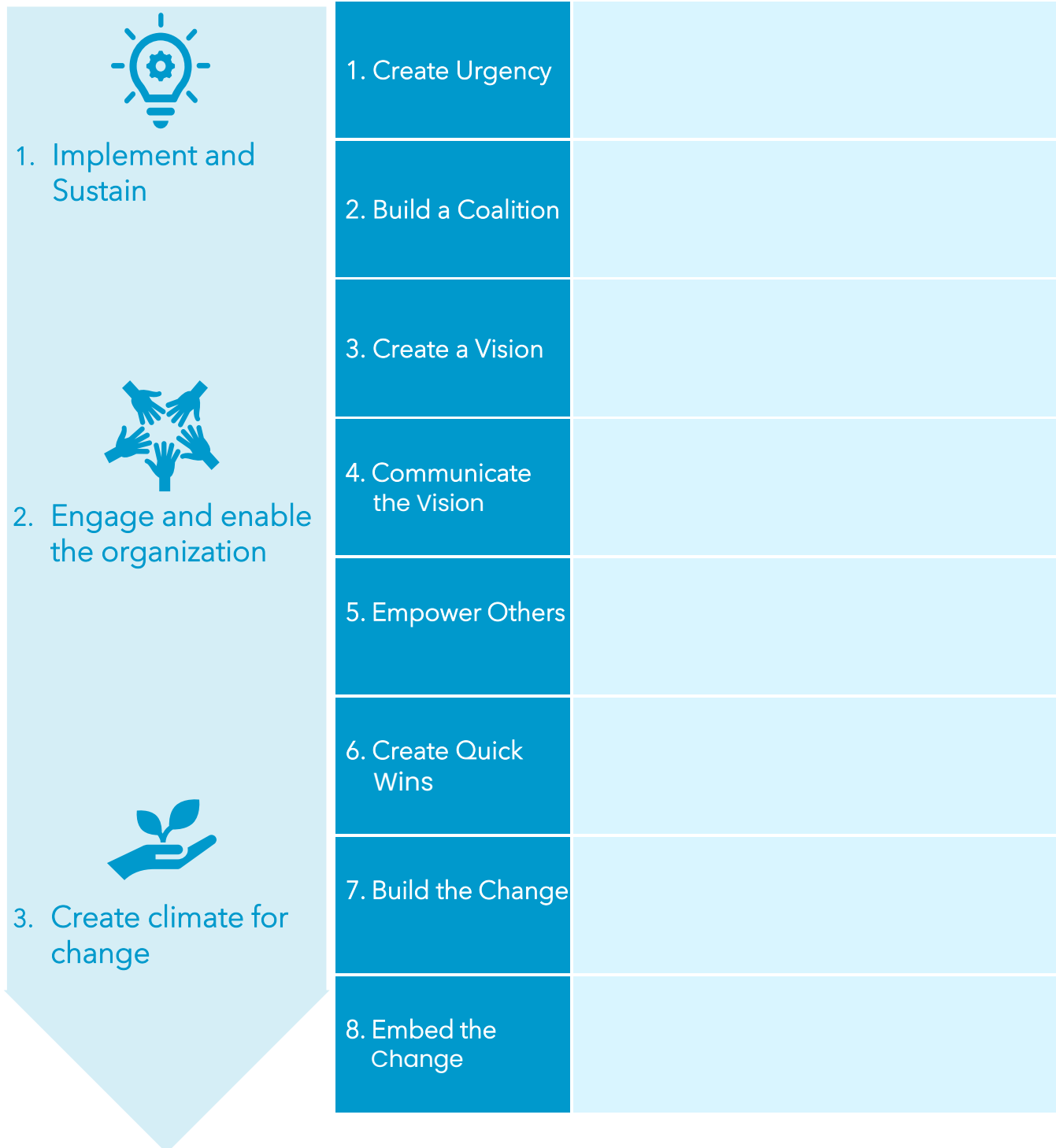
## Bridges Transition Model: Productivity & Emotion



# Kotter's 8 Step Change Model

Kotter's 8 step process is often clustered into 3 phases:

Notes:



# Notes

My Notes:



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# Lewin's Change Model

Lewin has yet another model that focuses on 3 key steps:



1. Recognize the need for change
2. Determine what needs to change
3. Encourage the replacement of old behaviors and attitudes
4. Ensure there is strong support from management
5. Manage and understand the doubts and concerns

Notes:



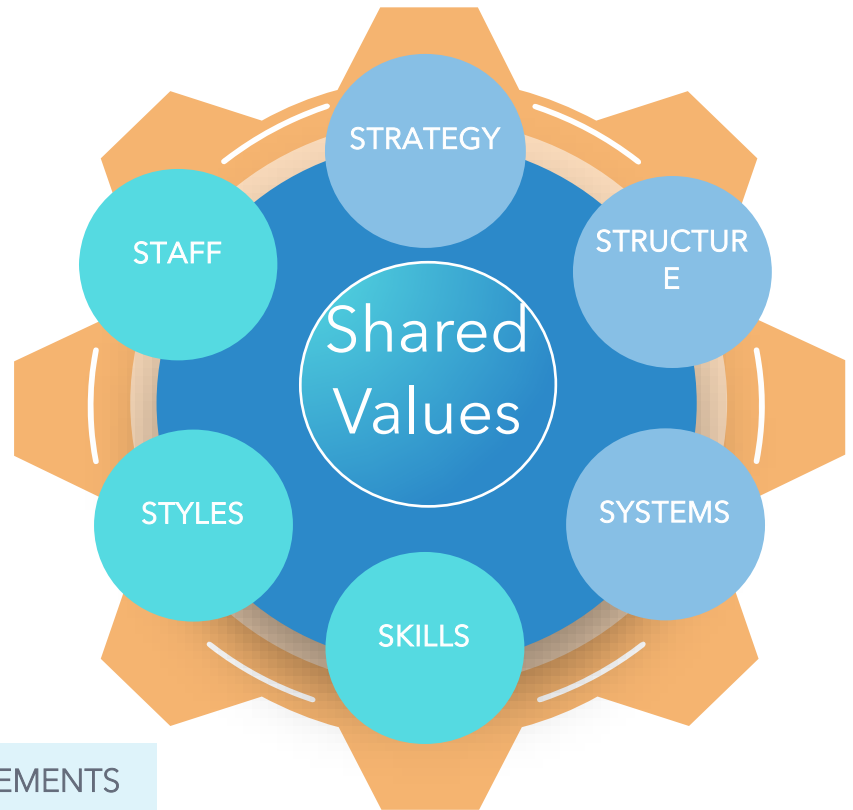
1. Plan the changes
2. Implement the changes
3. Help employees to learn new concepts or points of view



1. Changes are reinforced and stabilized
2. Integrate changes into the normal way of doing things
3. Develop ways to sustain the change
4. Celebrate success

# McKinsey 7S Change Model

The McKinsey 7S Framework is a management model developed by business consultants Robert H. Waterman, Jr. and Tom Peters in the 1980s. This was a strategic vision for groups, to include businesses, business units, and teams.



## HARD ELEMENTS

- Strategy
- Structure
- Systems

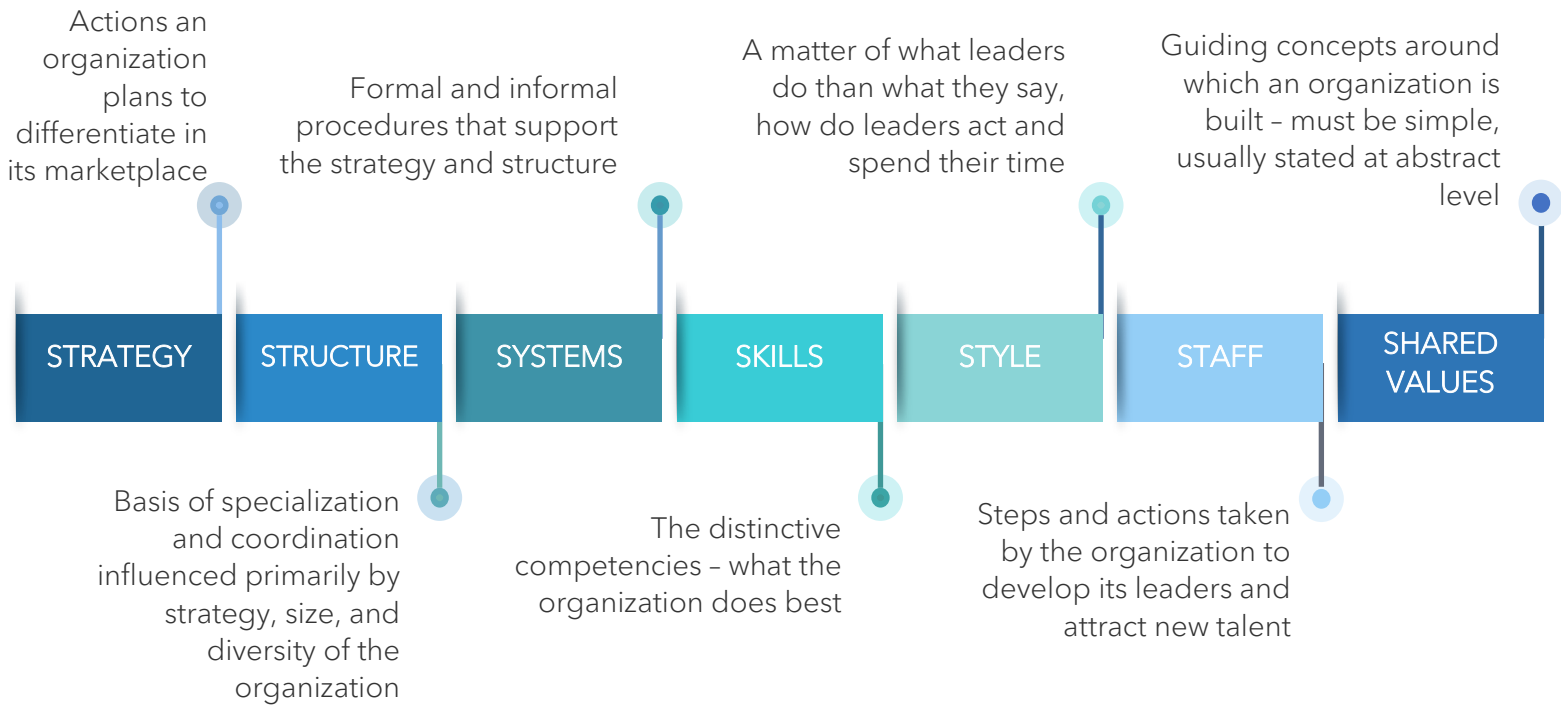
## SOFT ELEMENTS

- Shared Values
- Skills
- Styles
- Staff

My Notes: 

# The 7 Interdependent Elements

More on McKinsey 7S Model ...



My Notes: 

# How Change Management Works

Change Management is full cycle / 360 degree in that it considers all aspects of all touchpoints involved ...

Change management is an important part of project management. The project manager must examine change requests and determine the effect a change will have on the project as a whole. The person or team in charge of change control must evaluate the effect a change in one area of the project can have on other areas, including:



- **Scope:** Change requests must be evaluated to determine how they will affect the project scope.
- **Schedule:** Change requests must be assessed to determine how they will alter the project schedule.
- **Costs:** Change requests must be evaluated to determine how they will affect project costs. Labor is typically the largest expense on a project, so overages on completing project tasks can quickly drive changes to the project costs.
- **Quality:** Change requests must be evaluated to determine how they will affect the quality of the completed project. Changes to the project schedule, in particular, can affect quality as the workforce may generate defects in work that is rushed.
- **Human resources:** Change requests must be evaluated to determine if additional or specialized labor is required. When the project schedule changes, the project manager may lose key resources to other assignments.
- **Communications:** Approved change requests must be communicated to the appropriate stakeholders at the appropriate time.
- **Risk:** Change requests must be evaluated to determine what risks they pose. Even minor changes can have a domino effect on the project and introduce logistical, financial or security risks.
- **Procurement:** Changes to the project may affect procurement efforts for materials and contract labor.
- **Stakeholders:** Changes to the project can affect who is a stakeholder, in addition to the stakeholders' synergy, excitement and support of the project.



# Challenges with Change Management

Understanding the more common challenges to effective Change Management ...

## Change management challenges

Companies developing a change management program from the ground up often face daunting challenges. In addition to a thorough understanding of company culture, the change management process requires an accurate accounting of the systems, applications and employees to be affected by a change.



Additional change management challenges include:

**Resource management** - Managing the physical, financial, human, informational and intangible assets/resources that contribute to an organization's strategic plan becomes increasingly difficult when implementing change.

**Resistance** - The executives and employees who are most affected by a change may resist it. Since change may result in unwanted extra work, ongoing resistance is common. Transparency, training, planning and patience can help quell resistance and improve overall morale.

**Communication** - Companies often fail to consistently communicate change initiatives or include their employees in the process. Change-related communication requires an adequate number of messages, the involvement of enough stakeholders to get the message out and multiple communication channels.

**New technology** - The application of new technologies can disrupt an employee's entire workflow. Failure to plan ahead will stall change. Companies may avoid this by creating a network of early learners who can champion the new technology.

**Multiple points of view** - In change management, success factors differ for everyone based on their role in the organization. This creates a challenge in terms of managing multiple priorities simultaneously.

**Scheduling issues** - Deciding whether a change program will be long- or short-term and clearly defining milestone deadlines is complicated. Some organizations believe that shorter change programs are most effective. Others prefer a more gradual approach, as it may reduce resistance and errors.

# Key Change Roles & Responsibilities

In larger-scale change efforts, there are different roles and responsibilities, such as:

Notes:



## Sponsor

- Typically, an executive or senior manager with considerable influence
- Visibly sponsors the change
- Advises the change team and other leaders
- Supports the change team as needed



## Change Leader and Change Team

- Coordinates overall change program
- Develops clear strategies for change
- Develops a robust and thorough change plan to implement and sustain the change
- Responsible for successful change



## Communications Role

- Provides clear communication to all key stakeholders on change related issues
- Defines and delivers a robust and thorough communication plan as a subset to the overall change plan
- Develops 2-way communication channels to foster better assimilation, engagement and change adoption



## People Role

- Provides expert people / HR advice on transitions and support for the people who need to assimilate and adopt the change
- Ensures people aspects are thoughtfully and thoroughly planned for in the change plan, e.g., education on new processes, explanation of new reporting relationships, etc.

# Change Management Communications

Different examples of Change Management-related communications ...

Notes:



## Live forums

- › Department Meetings
- › One-to-one meetings
- › Town Hall Meetings
- › Brown Bag Lunches
- › Training Courses and Workshops



## Other forums

- › Emails
- › Corporate Newsletters
- › FAQs
- › Internal Memos
- › Posters
- › Intranet



## External influences

- › Marketplace Changes
- › Customer Inputs

# Change Management Checklist

Use a checklist to keep you and others involved in the change on track ...

My Notes:

Define the change vision and key outcomes (metrics for success)

Get a sponsor and clarify roles and responsibilities

Clearly plan scope, deliverables, timing, risks and required resources

Obtain the resources you need to be successful

Use vision, success metrics, stakeholders and customers to determine the messaging strategy

Create subset communications and education plans (as part of the broader change plan)

Routinely inform and update stakeholders and customers

Measure and monitor risks

Use training for instruction – and for marketing the change

# Change Management Questionnaire

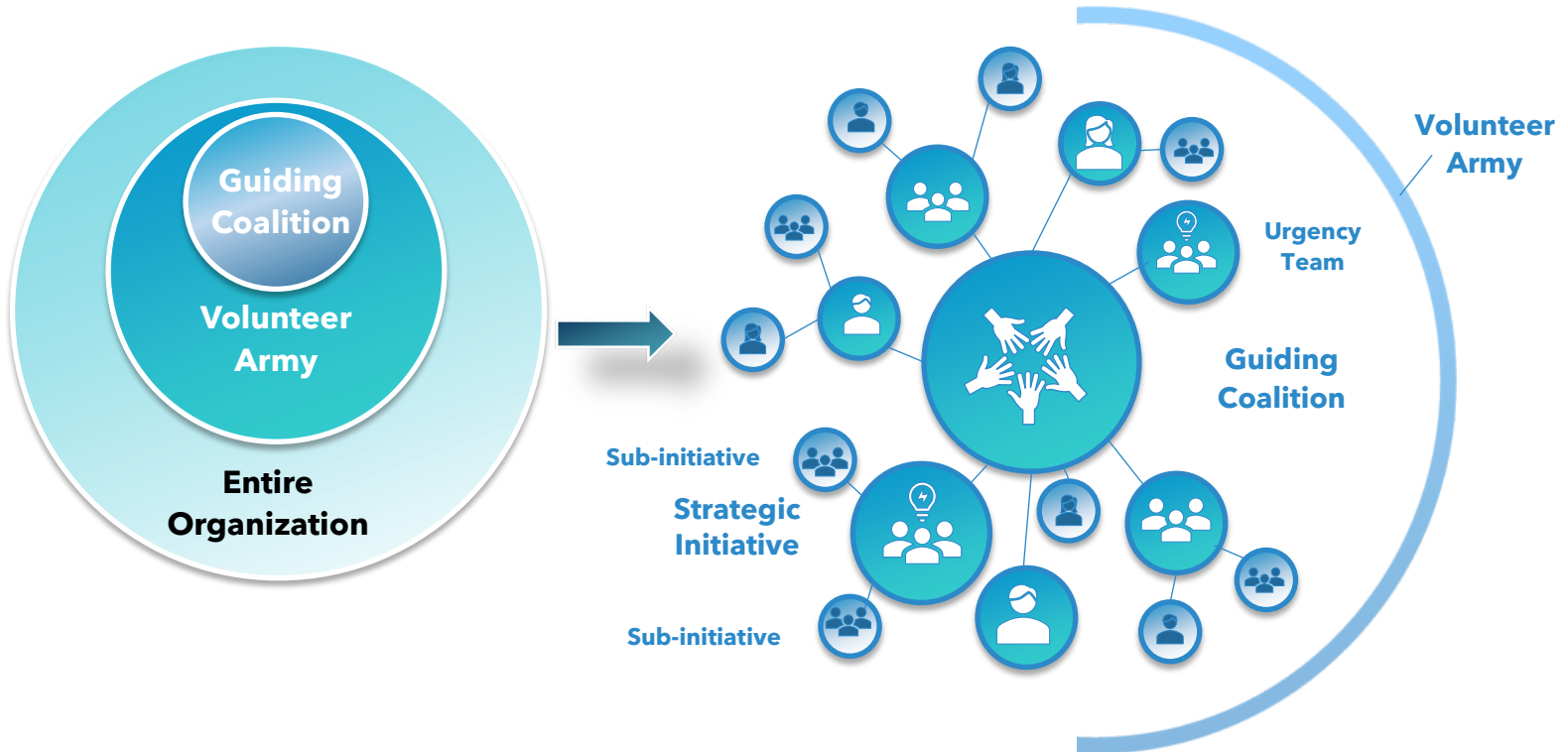
Evaluate the effectiveness of the change to know if it was successful ...

Questions	Comments / Feedback
What were the key objectives of the change?	
What was achieved once the change was implemented?	
What has enabled you to sustain the change?	
Did you effectively plan the change?	
Would you do anything differently next time during the planning stage?	
Did you communicate with the right people at the right time in the right way?	
Would you use different communication strategies in the future?	
What worked well with the change process?	
What would you do differently next time?	
What were the key lessons learned?	

# Empowered Change Networks

How to move from "I must" to "I want"

## CHANGE NETWORK



My Notes:



# Creating a Change Network

## What is a Change Network?

A Change Network is a group of Change Champions who are responsible to help define a project and contribute to the project's success by creating a top-down/bottom-up feedback loop. The Change Network often collaborates with both the project team and end-users to identify risks and promote change. As you engage the network, the network in turn engages the end-users and feeds back into the project.

A Change Network provides empowerment to the organization as they go through transformation. Brent Gleeson in his [Forbes article](#), "5 Ways to Empower and Engage Employees to Lead Change," said: "Inspiring the team is one thing, but physically and psychologically giving them more autonomy to participate in the transformation process is critical."

For change to be successful, people need to be involved and invested. Your Change Network is comprised of people who are responsible to lead the communication and inclusion effort, ensuring everyone understands the why and how behind changes being implemented. They are the best advocates for socializing and encouraging the changes that are on the way.

## Who are your ideal Change Champions?

Change Champions are no substitute for executive sponsors, who are "ultimately responsible for ensuring that the change realizes its intended benefits," according to the [PROSCI methodology](#). Instead, the Change Champions are often closer to the front line and are integral to the project success.

Change Champions may be **formal leaders** with hierarchical authority, or **informal leaders** who can influence an organization based on their reputation and ability to network. It is important to select a diverse group of individuals to champion your change efforts.

Identifying the formal and informal leaders provides a top-down/bottom-up approach with a feedback loop. Your informal leaders are excellent filters to take feedback from end-users and surface them to the key leadership stakeholders and project teams. Together, they make up your Change Network, which is responsible for communicating and encouraging the changes your team is implementing.

## What is the role of a Change Champion?

Change management is often confused with communications and training. While those are both integral to the process, they are not the only components. The objective of the Change Champion is to catalyze the project and provide feedback on what is working and what is not. Change Champions will:

- **Participate in training.** While the champions might not deliver training themselves, they should have a voice in role-based training. They know their end-users, if only through the feedback loop, and can advise on best practices for training.
- **Deliver communications.** Large-scale communications, especially delivered by C-suite executives, are the most effective means of sharing information during changes. Frontline managers or Change Champions are a close second, as demonstrated by the [PROSCI methodology](#).

# Creating a Change Network

- **Identify challenges.** Champions identify technical challenges, including defining requirements. As an example: a project where a system was rolled out without proper requirements gathering or feedback from end-users. It led to potential security risks, time spent from the end-users, and lost revenue.
- **Provide resolution.** Champions identify resistors to the change, active and passive, and work to resolve issues. There will be those who are vocally negative about the project, but such behaviors are easier to target and intercept. Those who are passive resistors and passive adopters are more nuanced and difficult to identify. Change Champions can help drive some of that effort to identify, predict behavior, and champion the project.
- **Define success.** Ideally the project has defined qualitative and quantitative success metrics. Your Change Network can help verify if these metrics are achievable and relevant.
- **Improve adoption.** Champions can reach out within their own networks to identify and align commitment from other users thereby demonstrating some initial adoption and strengthening adoption overall.

## How do you engage with Change Champions?

Building relationships with your Change Champions is critical to the success of your project. Here are some ways to maintain engagement:

- Ask Change Champions for their time early in the project once you have identified the objectives and measurements for success. Be gracious with your request and efficient with their time. This is a job above and beyond their day job. Give them appropriate parameters around time commitment and stick to it. There might be one-off requests but limit the need to add more to their plate.
- Thank them and, if possible, provide something tangible—even if it is a thank you note and positive feedback to the executive team.
- Provide a “What’s in it for me” so you can give them a vested interest in ensuring their role is valuable to bringing positive change.

- Kick off the program to the Change Network to explain the project, objectives, parameters of their role, and measurements for success. According to Harvard Business Review, maintaining role definition is essential to ensuring success. “Collaboration improves when the roles of individual team members are clearly defined and understood.”
- Maintain continuous engagement. Some projects last for years. To avoid losing momentum, maintain regular engagement with purpose.
- Move the Champions along the Kotter Change Curve more quickly than the end-users’ journey.
- Empower them and provide them with autonomy and purpose.

## What are the results?


A key principle to Change Management is ensuring the sustainability of a change long after the project implementation team has finished their part. In mobilizing the change champions, you have equipped them to carry along adoption and success after the change has become adopted, and the project team has rolled off of the project.

Successful change comes when we lead with empathy. Change can be scary and provoke anxiety, especially when we are on change overload, both professionally and personally. Find allies and work to empower them in their efforts. Technology is only as good as the value it brings to the people who use it.

Change is hard but there are levers that can make it easier. Building a network of the right people to act as your change agents is one of those levers.



# Notes

My Notes: 

A large, empty light blue rectangular area intended for taking notes.



# Appendix

# Change Management Checklist

Use a checklist to keep you and others involved in the change on track ...

My Notes:

Define the change vision and key outcomes (metrics for success)

Get a sponsor and clarify roles and responsibilities

Clearly plan scope, deliverables, timing, risks and required resources

Obtain the resources you need to be successful

Use vision, success metrics, stakeholders and customers to determine the messaging strategy

Create subset communications and education plans (as part of the broader change plan)

Routinely inform and update stakeholders and customers

Measure and monitor risks

Use training for instruction – and for marketing the change

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# Managing through Change

## Leading @ Vaxcyte



Participant Guide

