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Fair, Michelle

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Managing Change – Learnings from an Occupational Therapist

Michelle Fair[*]

Department of Occupational Therapy, Bond University, Gold Coast, Queensland, Australia

[*]**Corresponding author:** Michelle Fair, Department of Occupational Therapy, Faculty of Health Sciences and Medicine, Bond University, Gold Coast, Queensland, Australia, Tel: 0487000260; E-mail: michelle@absolutehealthservice.com.au

Abstract

Change seems inevitable in our current world of work. Whether it is workforce restructuring, new products and services, changes to ICT, a change in leadership, new customers and staff, varied supply chains, a change in equipment used, new locations where work is performed - the change is endless. As an Occupational Therapist I have seen the impact on workers and the organisation when change is managed poorly. It can lead to an absence from work, psychological and physical injury or illness, poor workplace dynamics, reduced workplace productivity, an increase in worker and customer complaints, and the lodgement of workers' compensation claims. The following is a summary of what I see as the key features of successfully managing a change initiative. When change isn't managed well, unfortunately the impact on workers and the organisation can be significant.

Consultation

Consultation needs to be engaging of the relevant stakeholders. Delivering one way communication to people is not consultation. We know that by engaging people, seeking their input, clarifying issues, and problem solving together, is the best way to gain commitment and buy-in [1]. We must consider both internal and external stakeholders in this consultation, and ensure that those persons affected by the change, are engaged in the consultation phase [1]. This doesn't mean every worker must be individually consulted, however there needs to be authentic and inclusive consultation processes across the range of stakeholders.

Prevention

Quality and relevant risk assessments must be completed prior to the change initiative occurring. This includes looking at strategic risk, business risk, and the project risk. Within these risks will be consideration of the workplace health and safety risks. At a basic level, we need to ensure we analyse the risks, update the risk register, mitigate any identified risks, monitor risks, and ensure we communicate widely to all relevant parties [2].

Organisations are founded on a basis of social psychology, and a failure to recognise this is likely to result in failed attempts at implementing successful change initiatives [3]. We need to consider people, and plan for strategies over time. Simply trying to institute change on to people will result in failure. To prevent this occurring, establishing a healthy organisation puts us in good stead to then work with our workforce when implementing change initiatives. Furthermore, having healthy workers means they are better prepared to deal with the stressors associated with change [4]. This is also linked with creating effective teams - people working with people. Effective teams are paramount in successful organisational change [5]. When talking 'effective teams', there is a strong connection between culture, leadership styles and individual worker behaviours. Ultimately, there is a social-psychology basis to preventing change initiatives from failing.

Early Response

Managers and supervisors need to be trained and skilled in identifying the early warning signs of resistance to change. Following this, they then must do something about it. This may include working with the individual to clarify the purpose of change, the benefits of change, answer any questions they have, problem solve any issues they have, and possibly refer them to other support services who can provide assistance through the change process. It is important for people to remember that not everyone responds the same way to a change initiative. Keeping in mind the five factors that are likely to influence an individual's response to change can be of benefit [6]:

- The nature of the change.
- The consequences of the change.
- The organisational history.
- The type of individual.
- The individual's history.

Using a model such as ADKAR may also assist in determining people's level of engagement [7]. This, along with pulse surveys and interviews, will help to capture relevant information so leaders and managers can respond early if barriers arise.

Communication

Effective, timely, and transparent communication is necessary to build trust, rapport and a willing coalition. It is also imperative to support workers who are away from the workplace (e.g. on sick leave, return to work programs, maternity leave etc.) as they too need to be part of the change process. Basically, we need the right style of communication, the right frequency, a variety of methods, and we need to deliver this to the right people [1]. Without this, a change management initiative is likely to fail.

Leadership

Understanding the workplace culture and creating a positive culture are imperative for business success. Leaders within the organisation

must take responsibility for this and ensure they inspire workers to achieve their optimum performance through authentic leadership [8].

Cultural change comes about when there is a connection and positive reinforcement between the strategy, systems, business structure, leadership style, worker skills, and staff involved. This cultural change can be seen as the 'shared values' identified in the McKinsey 7S model [2].

Planning

From a planning perspective, I believe thorough project planning needs to occur, in consultation with relevant stakeholders such as the change manager. For sizable change initiatives, a number of project planning elements and documents may be warranted as part of the project management plan [9].

1. Project definition.
2. Schedule/plan (e.g. using a Gantt chart).
3. Work breakdown structure including list of responsible persons.
4. Detailed project work plan.
5. Scoping document.
6. Stakeholder analysis.
7. Quality assurance plan.
8. Risk assessment and associated plan.
9. Communications plan.
10. Transition plan.
11. Evaluation.

In addition to this, having an overarching framework or model for change will assist in bringing about a successful organisational change. The model chosen will depend on the type of organisation and the preference of the change manager and other relevant stakeholders.

Sustainability

Organisational values have an impact on not only decision making, but also strategic change [10]. Many organisations will state their organisational values on their website, in strategic documents, and on posters and marketing tools around the organisation. This however is only one type of organisational value. For change to be sustainable, managers and leaders need to understand all types of values (espoused, attributed, shared, and aspirational) and their relationships and changes over time [10]. This leads me to my next point which is, at a fundamental level, leaders and managers must understand and pay significant attention to the human factor. An organisation's most important asset is their people [11]. If they solely focus on the 'clinical' elements of the business or the hard elements if you use the McKinsey 7S model [2], then they will fail to address much of what is relevant in establishing a shared vision and positive organisational culture.

Finally, to truly ensure any change is sustainable, the following should occur [12]:

- The change must have a good fit within the organisation so the transition from current state to future state is smooth.
- Ensure you take a systems thinking approach to change. Looking for the connections between parts of the organisation and understanding flow on effects of the change is required for sustainable change.

- Understand where you get the best leverage to support your change initiative.
- Understand the levels of adoption required by different parts of the business. Some areas only require identification of the change, while others will need to internalise the change.
- Know your tipping point, as this gives you insight to the duration required for embedding the change.
- Know your feedback loops and seek to have positive reinforcing systems in place. Knowing this means change managers can use leverage to get the 'biggest bang for their buck'.
- Efficient management of the process is needed. You must be able to measure the change so having accurate, up to date, and reliable data supports you in measuring your change initiative.
- Manage your transition. This phase of a change initiative must be driven by strategies and include effective measures.

It is my opinion that each of the features I mention above is important for successful change. They each have a depth of theory and evidence behind them, and require knowledge, skills, and motivation to implement. At the end of the day, the goal is for our workers to safely achieve their optimal level of performance, and for the business to succeed.

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