



SRA INTERNATIONAL  
ANNUAL MEETING  
**CHICAGO 2024**  
OCTOBER 26-30

# Leading Through Change: Leveraging Your Director Position to Make an Impact

Presented by: Theresa Couch, CRA; Kathleen Halley-Octa, CRA;  
Ivonne Kalinski, Prosci Certified Change Practitioner

# Meet Your Presenters



**Kathleen Halley-Octa**

*Certified Research Administrator  
Prosci Certified Change Practitioner  
Manager  
Attain Partners*



**Theresa Couch, CRA**

*Director of Research  
Administration Operations  
Michigan State University*



**Ivonne Kalinski**

*Prosci Certified Change  
Practitioner  
Consultant  
Attain Partners*

# What is Change Management?

# What is Change Management?



It is the application of a structured process and set of tools for leading the people side of change to achieve a desired business outcome.

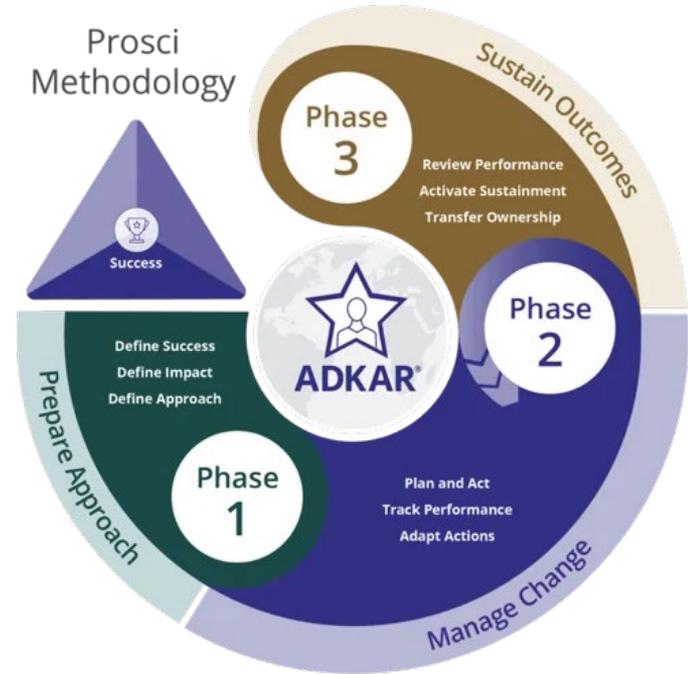
# Why is Change Management Important?

## Why is it important?

- Increase the probability of a project's success
- Manage employees who are change-resistant
- Capitalize the Return on Investment
- Build change competency into the organization

## What is involved in Change Management?

- Communication – why is change needed, and why now?
- Training – Knowledge, confidence, and support
- Empowering Individuals to Impact Change



# Poll

What do you feel has been the biggest barrier to change for you?

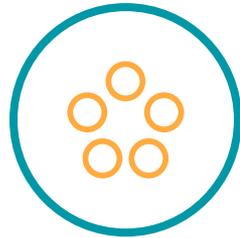
1. Not understanding the reason behind the change.
2. Not understanding how the change will benefit your day-to-day work.
3. Not feeling included in the process.
4. A lack of training or ability to perform the new process.
5. Inability to sustain change without reverting back to the previous way of doing things.



# ADKAR

## Prosci Foundation for Change Management

- A** Awareness
- D** Desire
- K** Knowledge
- A** Ability
- R** Reinforcement®



### 5 Elements

ADKAR represents the five elements of change that must be achieved for the change to be a success.



### Change Patterns

ADKAR was developed by Prosci after studying the change patterns of more than 700 organizations.



### Individual and Organizational Levels

ADKAR is an effective tool for managing change at an individual level and guides activities at an organizational level.

# Change Management Roles

# Prosci Change Triangle (PCT): 3 Elements for Project Success

All three elements must be present for project success:

- **Leadership / Sponsorship** provides guidance and governance
- **Project Management** gives structure to the technical side of the change
- **Change Management** supports the people side of the change



Prosci® PCT™ Model

# Obstacles Unique to Higher Education

# Resistance to Change

- ▶ Resistance is a natural reaction to change.
- ▶ When managed properly, resistance can be constructive and improve change outcomes.



© Disney/Pixar

# Complicated Organizational Structures

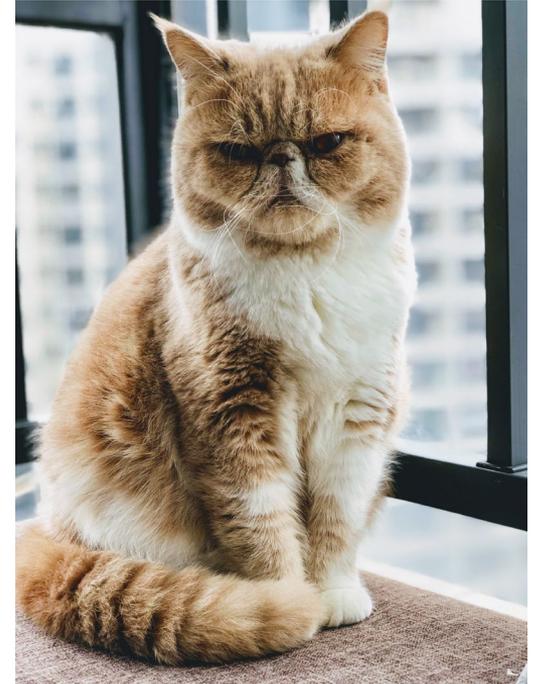
- ▶ Intersecting Hierarchies
- ▶ Faculty vs. Administration
- ▶ Central Office vs. Department
- ▶ Difficulty to Identify change influencers
- ▶ Communication is not linear



# Lack of Trust

## Leadership & Prior Experience with Organizational Change

- ▶ Lack of engagement from project sponsors
- ▶ Lack of support from an individual's direct supervisor
- ▶ Misalignment of project goals and personal incentives
- ▶ Bad experiences with prior change initiatives



# Differences in Day-to-Day Operations

## Perceived Changes in Role or Job Value

- ▶ Silo mentality
- ▶ Fear
  - Job security
  - Being left behind
  - Changes in workflow
  - “Additional” work
  - Increased transparency



# Solutions

# Sponsor and Sponsorship Coalition

- ▶ **Who is an ideal Sponsor?** A senior leader with authority and credibility.
- ▶ **ABCs of Sponsorship:** Actively and visibly participate; Build a coalition of sponsorship; and Communicate directly with employees.
- ▶ **“Sponsorship Coalition”** consists of the various sponsors and coaches throughout the organization, who support changes by conducting key activities within their respective groups.
- ▶ **Why is it important?** In each of Prosci’s nine benchmarking studies (from ‘98-’17), participants identified the # 1 contributor to success as “Active and Visible Sponsorship”



**Build a  
Coalition  
of Support**

# Activate Your Change Network

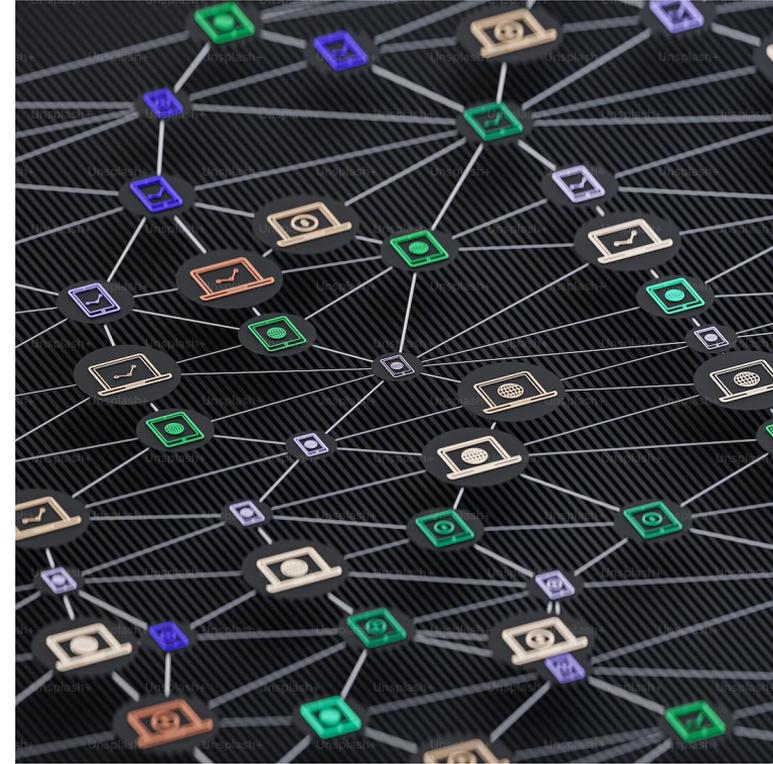
## What's included in this network?

### ▶ Coaches/Influencers

- People Managers
- Well funded faculty who are “popular”
- Any influential individual

### ▶ Tools and Resources

- Training Library: SOPs, Videos, Live Help
- Info Webpage – where to find resources, and who to contact
- External Change Practitioner

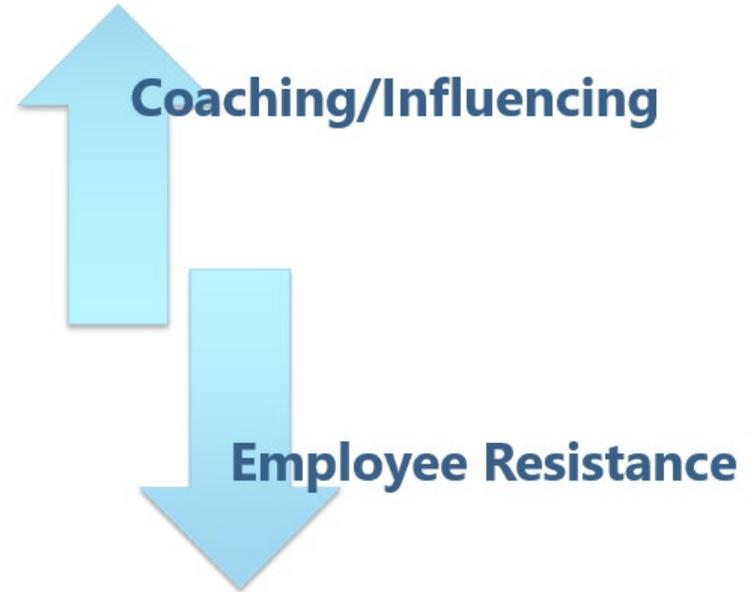


# Coaching Plan

---

## Coaches and Influencers

- ▶ Training for Coaches/Influencers
  - Why are they selected (CLARC)
  - Individual Change and ADKAR
  - Ensure that shared message is consistent
  - Sample agendas to guide conversations
- ▶ Provide resistance management tools
- ▶ Conduct systems demos to familiarize them



# Resistance Management Plan

## What it looks like

- Emotion
- Disengagement
- Work impact
- Acting out
- Negativity
- Avoidance
- Building barriers
- Controlling



# Resistance Management Plan

---

## Suggested Mitigation Tactics

- Listen and understand objections
- Focus on the "what" and let go of the "how"
- Remove barriers
- Provide simple, clear choices and consequences
- Create hope
- Show the benefits in a real and tangible way
- Make a personal appeal
- Convert the strongest dissenters
- Provide incentives
- Demonstrate consequences



# Communication Plan

## Dissemination

- Spreading awareness of **why** there is a need for change
- Sharing information about the who, what, when, and where
- Answering the question of “**WIIFM**”
- Utilizing various communication mediums, not just one



# Communication Plan

---

## Soliciting Feedback

- Focus Group
- Surveys
- 1:1 Conversations
- Small Team Meetings



# Training Plan

---

## Making the unknown known

- Multiple training sessions
- Different types of sessions for various learning types
- Standard Operating Procedures and other resources
- Ongoing sessions far after the go-live date



# Reinforcement Plan

## The final building block of ADKAR

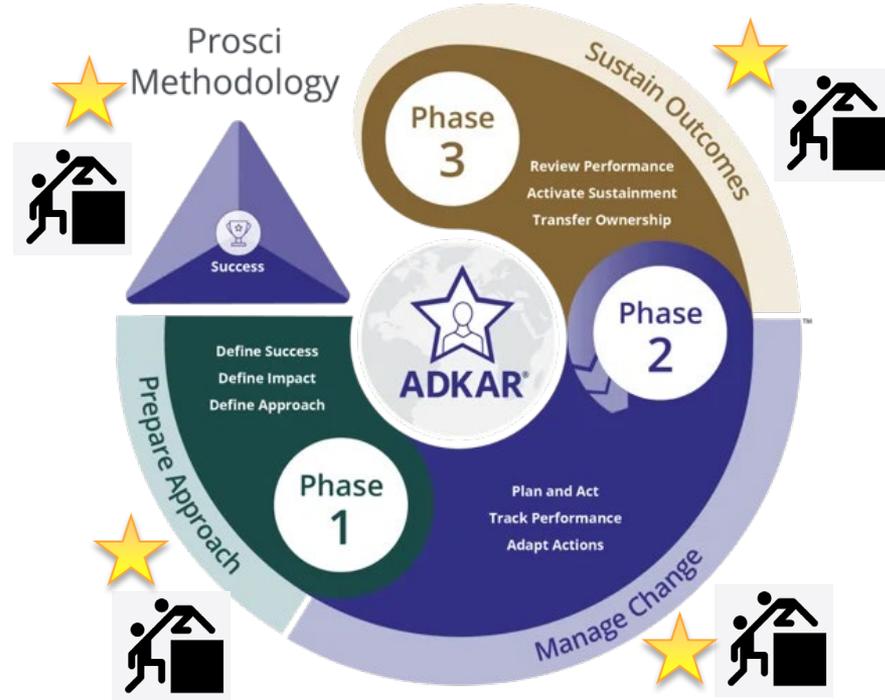
- Maintain and Sustain the Change
- Ensure that coaches continue to have conversations with their team
- Gather feedback to learn who the change champions are and where there are gaps to diagnose
- Celebrate success and implement corrective actions
- Rewards should be meaningful to the individuals (know what motivates your team)



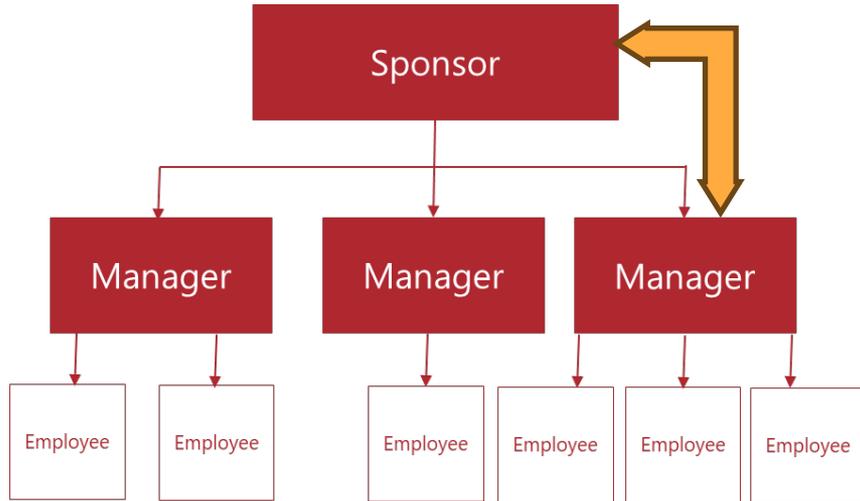
# A Deep Dive into Coaching and Influencing

# Where are you in the Change Management Process Map?

Coaches are not in one single place in the change process. They appear throughout!



# Coaching Plan



## The Sponsor and project team will

- Provide a **Coaching Training** for Managers.
- Complete an assessment (**ADKAR**) of managers to learn their barrier points.
- Meet with change resistant managers to gather information on what their obstacles are and help resolve concerns (before they meet with their teams).
- Identify Managers who are change champions

# Coaching Plan: Why are Coaches Important?

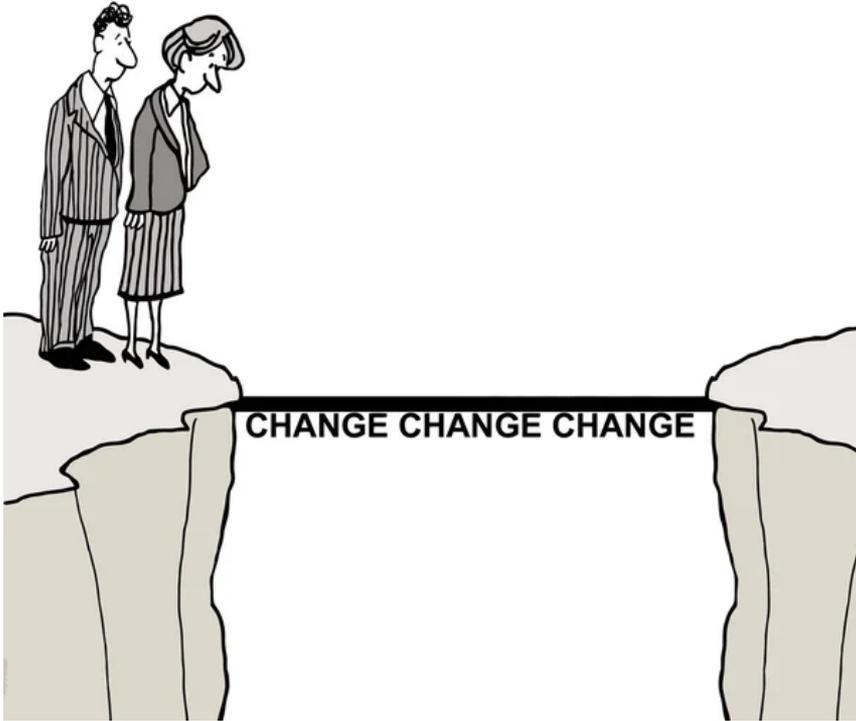
---

## Managers are Coaches with the “CLARC” roles

Their team trusts them, they are close to where the change occurs, they mitigate resistance, and they build support. They measure ADKAR for the individuals on their team.

- **C**ommunicators - receive information from the Project Team and share it with their team (typically in their team meetings and casual conversations)
- **L**iaisons between the project team and their team
- **A**dvocates of the change, continuously spreading positive thoughts and motivating their team to get excited and support the change
- **R**esistance Managers – mitigating their team member’s resistance
- **C**oaches – guiding their team members through the change through meetings, conversations, trainings, and finding resolutions or answers to concerns

# Coaching Plan: Resistance Management Overview



## How does a Coach identify a resistor?

- Direct feedback from the employee
- Observing non-verbal actions during meetings about the change
- Other team members' feedback to the Coach
- Supervisor input (if your direct report manages others)
- Engaging in conversation with team members to get honest feedback

# Audience?

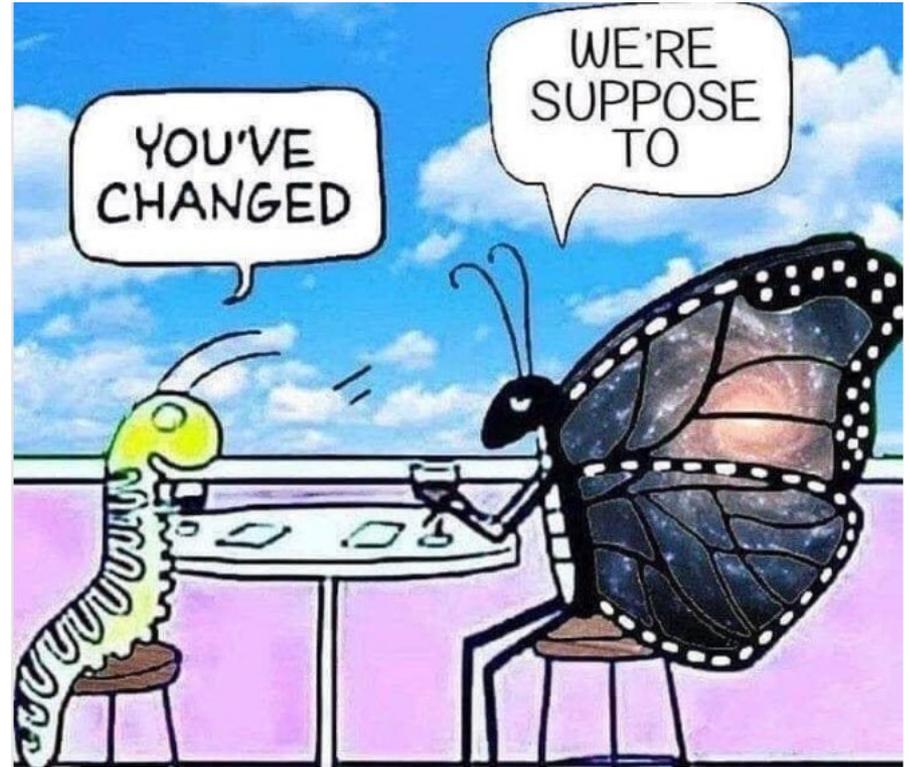
Share your thoughts, comments, or experiences on

- How you successfully led through change
- Or did you end up with lessons learned?



## Conclusion

1. Understand your role in the change process and why you must be the advocate for the change to lead employees through the change journey.
2. Identify resistance to change and coach stakeholders through challenging times.



# “The only constant in life is change.”

-Heraclitus, Greek Philosopher

## Any Questions or Comments?

