

- Hey, and welcome to PCTY Talks. I'm your host Shari Simpson. During our time together, we'll stay close to the news and info you need to succeed as an HR pro and together, we'll explore topics around HR thought leadership, compliance and real life HR situations we face every day. This episode was recorded live at SHRM 2022 in New Orleans. And joining me during the session is April Callis-Birchmeier, owner of Springboard Consulting, author and keynote speaker. April, thanks for joining me on the podcast.

- Oh it's my pleasure, I'm really happy to be here.

- I was hoping we could start with maybe you sharing a little bit about your background and passion for organizational culture.

- Well, I have to say that I did my undergrad degree in communications and I was kind of doing a lot of theater and things as well. It was a dual degree and then I really got focused and I got my master's in communications and training and development. And the reason I was so excited about training and development was that I saw people who were training employees at Ford Motor Company where I had a consulting contract, and I said, what is that you're doing? And they said, it's called training. And I was like, that's the thing I want to do. So I started out in training and I really loved my training career, I was having a lot of success and I really loved the clients I was working with, but I met somebody at an Association of Training, ATD, which.

- Yep.

- And I went to this meeting and she said to me, what do you do? And I said, well, I'm a trainer. And I told her also about my party business that I had at the time. And she said, I love the way you think, we need you for organizational change management. And I had never even heard of organizational change management, but she recruited me and I started my first ERP project in 1997, and we barely had any internet or anything at that time. And I loved it immediately because it was the perfect combination of communication, training and development and business redesign, which I love.

- It's amazing that somebody was able to identify that passion for you. My origin story is a little bit the same where I was in the mental health profession and I had somebody pull me aside and say, hey, you are in the wrong profession, you need to be in HR. And I was like, yeah, no, I don't. But I'm so glad that somebody saw that passion and me. So it's so cool to hear that from you as part of your origin story. You know, for the last two years, HR practitioners have lived in a constant change environment. How can we start to think about the impact of organizational change management on creating better outcomes for change? I mean, ultimately I think we all know we need good change management process, but we get stuck in react mode instead of plan mode. So how do we change that? How do we think

differently about that?

- Well, I think one of the keys is what HR professionals are already so good at, one of the keys is really putting yourself in the place of the stakeholder's shoes, like that stakeholder, that end user, that downstream external stakeholder, like what is it that they are experiencing? And I also have a PMP, so I'm a project management professional, and on Project Teams, I have noticed that we're very focused on technical things but we are not thinking about the people side. And that's what I love so much about change management is that we're always focusing on our stakeholders. So I feel like when I'm talking with leaders and when I'm talking with my clients and trying to assist them and moving through a change, my first question is, have you done a really thorough look at your stakeholder groups and how many are in there and what kind of change impact does it have on which type of stakeholder group? And many times they're like, well, we didn't really, we know we have like 14,000 stakeholders but we didn't really do anything else. Like we know who they are, but that's it. And I find that that lack of thinking about the end user and that stakeholder will lead us many times into making technical mistakes by planning out a project, without planning out the people side of that project, the change management side. And I'll have to give you a quick example. I was just talking with a group and they said, we're going to retire seven systems. And we think we're gonna retire these seven systems over the next three years. And we're going to just do it system by system. And I said, well, has anybody done a stakeholder analysis to see what stakeholder groups are in multiple systems? No, we hadn't really thought of that. I said, because when you retire one and then you've got stakeholders who are in one retired system and two non-retired systems, it makes it very difficult to work. And they said, oh, we hadn't even thought of how that would happen. So we're going to re-baseline the entire project, we're going to plan for how we'll roll out change to the different stakeholder groups in a way that makes it easy for them to adapt it.

- I think that's such a good point, especially when you think about systems, right. You know, technology is ever changing. So companies are always evaluating is this the best bang for our buck? Is it the right tool for us to use? So when I think about change management and some of the things you've shared already, I think something that gets lost is the benefits on the narrative when we're communicating the change out. There is large benefits if we get that right. So how do we think about getting that piece of it right? Even if we have to make these big sweeping system changes or big process changes?

- I've started my career in the ERP space, implementing a large ERP for a major university. And I learned from that experience that all of the technical bullet points in the world will not help people understand the change. What they need is a relevant and relatable story of the change. And that's the first piece of my ready set change

framework, the ready piece is relevant and relatable story of change. And I do talk about how I discovered this for my myself and what I tremendous impact it had on the stakeholders at that university. And I have to brag that 20 years after that implementation, that group is still using that story. That particular change agent group still uses the story as a framework for them to understand how they should keep the ERP the way they want it to be and not let it fragment out into separate databases or separate camps, doing different things. And so it's really fascinating to me, and I spend a lot of time talking with groups about the story of change and we have to identify the benefit of the change, and figure out what's the story that represents that. And one of the techniques to use when you're trying to develop that, understand that story of change and to tell that story of change is figuring out that benefit. Like if we don't know the benefit of change, why are we changing?

- Yeah.

- If we can't express that in a clear, concise, relevant and relatable way, why would people do it? Yeah.

- They won't.

- When I think about telling a story, one of the things that I think I've utilized in my career is finding a champion that I can partner with that can amplify the story that has some of that camaraderie already built. Have you found that that's a successful way or maybe there's a tactic that we can use to find those champions in our groups?

- Well, in change management, we often talk about having a sponsor, and that sponsor is ultimately the person responsible for the change. And I honestly feel that it is my mission to ensure that my sponsor knows what they're supposed to do to help people. I engage that leader and I really set them up for success. I have a sponsor success kit, and I really prep them on these are the things that you need to do to help this change be successful. And I look at what their strengths are, right. Some leaders are so good at telling stories and then I'm like feeding them a lot of different storylines. You know, I'll give them like a key message for that month or a key message for a week and help them to craft like little side pieces that go along with our story of change. Some leaders are not as comfortable in front of everybody, but there's ways that we can make them more human. And so one thing I did with a large HR transformation was I worked with the leader and we did video snippets. She was so funny when she was talking with her senior leaders. So I did like six or seven Zoom calls, and then we clipped together a little video and we sent it out and people loved it. They felt so connected to her. And so I feel like there's so many different ways that we can really set our leaders up for success and build that comradery with our change management

practice so that our leadership is able to really rise to the occasion. And when they understand when our sponsors understand how incredibly important it is for them to be able to lead the change successfully and how the preparation that they'll do to prepare other people for change makes such a tremendous difference, they are excited about it. They're like, oh, I have a cure way to make this better. I'll do it. So I've developed a lot of tools. I have an engaging leaders brief that I worked on because I only got 15 minutes a week with one of my leaders. And I had to give her a quick way to see all the things that we were communicating and doing, and she needed to be able to be a part of it. And so I think there's a lot we can do when we prepare the leaders and we make sure that they know the story of the change and how they impact others.

- I'm curious, and what do you include in that sponsor success kit?

- I have so many pieces. One is like, I really feel our sponsors need orientation. Like when we're kicking off a big change, like they need orientation.

- Yeah.

- They need to understand, they need to be in the meetings, in the conversations about what is the benefit of the change, right. They need to understand the benefit of the change at a cellular level.

- Yeah.

- They really need to be able to speak to it all the time. And I think also they need to have a sense of, here are all the pieces that we can give you to make you more successful. So a lot of times I will do like video interviews. I've done like virtual summits with my leaders. And sometimes those are really helpful 'cause you can just email out like a 15 minute conversation with a leader every week. And with your sponsor, that's just ideal. Many times I'll do a kind of a strengths assessment so that I can see what they're good at. Like sometimes I have leaders who are great writers, and then what I do is I'll give them bullet points and let them write the rest or I'll give them kind of a terrible first draft, and then I'll let them write the rest of the article, because they enjoy writing and they're good at it and have they want to be connected in that way. Some folks, as I said are really great at telling stories, and many leaders have a lot of charisma and you have to find out what they're excited about. I had a leader who was really into golf and he was so into golf and everything about golf that we decided to like create the entire sort of story of change around golf because he could speak to it so naturally, like it was just so easy for him. He's like, well, I have to tell you where we are right now, we're in the sand trap. So that kind of thing, and then I also have some tools, like the engaging leaders brief, I have tools that I give them also like a content calendar so they understand when

messaging is going out so they never have to panic and say, when are we gonna tell somebody about this?

- Yeah. And then I give them.

- I love that.

- A measurement tool.

- The golf story is great. And then like hone in on the thing that they're passionate about.

- Yes.

- I love that. You have a model, you talked about it a little bit already, it's called ready, set, change. It's a five step framework to increase change adoption and initiate success. And obviously you have a session here at SHRM so I'm not gonna have you give us all the details, but maybe you could share a little bit about that model.

- Well, I really thought a lot about, how is it that I can help our project managers and our change management professionals and our HR professionals all come together? 'Cause that's kind of like my sweet spot, like if you have that Venn diagram of project managers, HR professionals and change management professionals, that's it for me. And I thought, we're not always speaking the same language. I have been trained in many different change management methodologies. I've been trained in one of them that has a lot of templates, and that's great. And I think that there's always value in learning new things in that. But one of the problems I ran into was that as a change management professional working with project managers, we were not speaking the same language and I needed a fast easy way to help them understand, here are the five things, so if we do these five things and we put those in the project plan, we'll be successful. And when I was able to articulate it to them, I was able to articulate and say to them, this is the ready model. So we're going to have a relevant and relatable story of the change. And that happens right here and we're carrying that through. And then we have to engage our leaders and that's where we really go in on those sponsors and get them on board, and then we ensure that all of our cascading sponsors are also telling that same story and they all understand the story and what's at stake. And so I built this framework so that it would be possible to say to my project management leaders, hey, you know, we're on A, we're on the advanced communication side of our ready model. And so advanced communication is really addressing the issue that I see happen frequently, which is nobody wants to tell anybody until it's perfect, right? Like this communication is not perfect yet. And I'm like, you have to tell people what you know when you know it. The most recent Gallup poll the State of the American Workplace Report, Gallup has identified that you have to hear something nine, or be communicated

nine to 16 times before you realize that.

- Oh, my goodness.

- It really applies to you.

- I didn't know it had changed that much.

- Yeah, it used to be seven.

- Right.

- It's not seven, it's nine to 16 times, and it is really hard to get people's attention because there's so much noise right now in the world.

- Yeah.

- So it's a model that I just put together, develop and support has all of our training and post go-live support in it. And then I really needed to focus on how to address resistance. So the why, the why of the change is how we address resistance. And we have to look at all those resistant responses that we see and we have to take a look at where they're coming from, and then there's specific techniques we can use to help people become less resistant and help them overcome sort of that human response, which is resistance.

- Yeah. As you think forward to where we are now coming, not really coming out of the pandemic, living in the pandemic, I guess would be a better way to phrase it. You know, how do you see change management evolving as we add on the complexity of flexibility and the definition of work location, like where work happens. That's gotta have an impact as you think about change management.

- It does, it really does. I mean, RT0 is a big topic right now. And I think that, returning to the office or not returning to the office, or, I was just in somebody's session who was saying, it's so difficult to communicate on Zoom because we don't have any nonverbal communication. And I agree with that. And I think that one of the growth areas really for human resource professionals is change management because it's so needed. And all of a sudden, there's this understanding that organizational change management actually increases adoption. It speeds the adoption of change and it helps people overcome the resistance that we absolutely know they're going to have. So when I'm looking forward and I'm thinking like what is on the horizon? We have a cert, there's a certification for change management professionals, there's probably several, but there's one from a change management professional group. And one of the things that I think is interesting is that HR professionals are uniquely positioned, uniquely positioned to really dig in, as specialize in this organizational

change management field because they already are thinking about the stakeholders, they're already thinking about all of these issues and just adding this layer of depth to their practice I think can really drive a lot of change. And I think it would really help our organizations to adopt changes much more quickly and with less pain.

- Well, April, this was a great discussion. Thank you for sharing a little bit about your model and what you're doing in the change management space. I appreciate it.

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