

# How to Deliver

**A**s organizations change more frequently and radically, the training profession is getting more deeply involved in the change process.

We used to assist an organizational change by teaching the skills needed to carry it out, as determined by the organization's leaders. Now, our role is expanding, especially in the delivery of the change message.

Here's the typical change management process:

- ▶ Step 1: the strategy. Executives or a design team decide the new strategy.
- ▶ Step 2: the message. The strategy is announced (usually by executives) and employees are asked for support.
- ▶ Step 3: enrollment. People enroll (or not).
- ▶ Step 4: training. People learn how to perform the required new skills and behaviors.
- ▶ Step 5: reinforcing. Managers and systems act to support new behaviors.
- ▶ Step 6: monitoring. Feedback is monitored; adjustments are made.

Traditionally, training professionals entered that process at step 4, after the change was announced and employees had a chance to enroll or connect with it. Now, we are expanding our role in the process, both downstream and upstream. We expand downstream when we take on the role of performance consultant. In this role, we step out of the classroom to conduct job training in the trenches. We also take on part of a manager's reinforcement role (step 5).

We're also expanding our participation upstream. For example, many training professionals have designed and conducted enrollment meetings (step 3). Those events typically follow up an executive-driven change message with one or more interactive exercises to help employees understand the meaning and value of the change.

Some of us have had the opportunity to shape the message in the first place (step 1). For example, we're sometimes on the change design

team or provide some input into what the change will be. In this role, we can influence the communication plan before a change is announced.

Rarely, however, do training professionals deliver a change message at step 2. That's usually the prerogative of an organization's executives. Yet, from a learning point of view, it's the weakest link in the change process. It's the step where we could make a new and significant contribution. By making the message easy to learn and accept, we can shorten the change management process and focus everyone's attention on doing what is in their collective best interest.

Some executives do a wonderful job delivering a change message so that employees understand and appreciate it. Too often,

however, the message doesn't focus on employees' issues and fails to enlist their support. That failure to communicate occurs because basic principles of learning aren't applied. That's not necessarily the executives' fault; they may not know what training professionals know about employee learning. In other words, we could bring a lot to making a change message more "learnable" when employees hear it for the first time.

That raises two questions: How can learning approaches improve the design of a change message? How can we position ourselves to deliver our message-enhancing services?

## Constructing a learnable message

What learning approaches can we use to improve an executive change message? Some important ones are

- ▶ focusing on relevant learning objectives
- ▶ addressing employees' real concerns
- ▶ making a connection to employees' shared values.

First, it's essential to help executives focus their message on relevant learning objectives.

Typically, employees make up only one constituency that senior management worries about when it announces corporate changes. Executives are also concerned about stockholders, customers, and the general public. There are enormous business and legal implications regarding the crafting and carrying out of a change message. The pressure to maintain customers' confidence, avoid insider trading, and safeguard investors' money forces most executives to worry last about the shape of the message to employees. Too often, employees get the warmed-over stockholders' speech in which learning objectives are aimed at an irrelevant audience.

As training professionals, we can assist that situation by helping executives focus on the appropriate learning objectives. The box shows the key learning objectives for messages delivered to several principal audiences. In each case, there's one objective about understanding the nature and value of the proposed change, and a second objective about urging the audience to perform a certain action (such as buy stocks, buy products, or pitch in).

The box lists the audiences in the sequence that communication typically occurs—from key managers to stockholders and so on. There are good reasons that employees are at the end, but there's no good reason that the message givers should confuse the objectives for the message to employees with the objectives for the other audiences—though many employees are also stockholders, customers, and community members.

The best practice for designing the employee version of a change message is to rethink the learning objectives from employees' point of view. The box illustrates an expanded list of objectives for a typical employee audience. If we can help reshape a mes-

# a Change Message

sage to address those objectives, the executives' speech will go a long way to helping employees understand and accept a proposed change.

**Addressing real concerns**  
Which of the learning objectives do you think executives fail to address most often? In my experience, they do an excellent job with the first two objectives (understanding and appreciating business strategy and business case), and they're fairly clear about the last objective (making a commitment). But they're often vague about helping people visualize their contributions—a task they usually leave to lower-level managers. The learning objective that they avoid most is helping employees perceive personal value in adopting the proposed change. In other words, they fail to address employees' concerns.

That leads to another recommendation for making a change message more learnable—addressing employees' real concerns. The secret to developing a change message for the members of any audience is to stand in their shoes and consider the message from their point of view. That's because, in the end, people typically do things only for their own reasons. So, we might as well help them reflect on their reasons for cooperating.

One learning technique is an exercise in empathy. It involves sitting down with executives and brainstorming questions employees are likely to ask. Then, we can help the executives raise and answer such questions while delivering a change message. That's the same process that virtually any trainer uses at the beginning of a class to ensure that all participants have their needs expressed and met.

It's important for executives to volunteer to state employees' concerns during the delivery of a change message. That's because—for many reasons—employees don't usually articulate their real concerns in large, group meetings with executives. The best change-message speeches include overheads listing employees' probable concerns. In one case, an executive read the questions from a simulated suggestion box. In another case, an executive, taking on Johnny Carson's famous Carnac persona, gave each answer first and then "guessed" the questions.

Here are some of the questions (concerns) that come up most frequently:

- ▶ Will any employees lose their jobs? (If the answer is yes, many other questions will arise.)
- ▶ Why were we doing the wrong thing before?
- ▶ How does this change fit with pre-

## TRAINING AND HRD

PROFESSIONALS CAN PLAY A PIVOTAL ROLE IN HELPING SHAPE AND COMMUNICATE AN EXECUTIVE-DRIVEN CHANGE MESSAGE—AND HELP EMPLOYEES UNDERSTAND THE MESSAGE FROM THE GET-GO.

BY TOM KRAMLINGER

vious changes?

- ▶ What will remain constant?
- ▶ How is this change grounded in our values and commitments?
- ▶ What will the organization look like in six months? In a year?
- ▶ What will we gain or lose personally?
- ▶ What support will we get to make the change?
- ▶ What will executives do to make sure the change works?

Even if an executive can't answer such questions, it's important to bring them up and give the most honest answer possible.

## Connecting to shared values

Typically, one of employees' deepest concerns—and one they're least likely to articulate at a group meeting—is about how a change is consistent with the organization's values, which are bound with their vision of their work and the psychological contract that they thought they have agreed to in the course of their employment. When a change seems to violate such values, a deep bond is broken. That makes it difficult

## RELEVANT LEARNING OBJECTIVES

### Audience

Key Managers  
Stockholders  
Customers  
Community  
Employees

### Learning Objectives

- ▶ Advance information
- ▶ Help make it work
- ▶ Effect on stock value
- ▶ Buy more stock
- ▶ Here is our value to you.
- ▶ Keep buying our products.
- ▶ Most good for most people
- ▶ Maintain good will
- ▶ Here is how the strategy works.
- ▶ Act to make it happen.

### Objectives for Employees

As a result of hearing the message, employees will

- ▶ understand the business strategy
- ▶ appreciate the business case
- ▶ identify areas of contribution
- ▶ see personal value in the change
- ▶ make a commitment to act.

for employees to commit positive energy to a new direction. In their book *Aftershock*, Buchholz and Woodward write: "The one constant in change should be an organization's value system.... If you are reaffirming old values or creating new ones, people need to know it. They need to see it—in writing and in action."

Yet, that's one of the softest issues—one that executives usually try to avoid. Other issues are more concrete and operational. They can be answered with data or, at least, with promises and explanations. The value issues can be answered only with honesty and empathy—and a little help from what we know about adult learning.

As most trainers know, adults learn best from their own experience; nothing is more reliable. In the context of organizational change, that means that employees tend to have these shared values:

- ▶ Everyone's experience counts.
- ▶ What we (especially our founders) did in the past is important.
- ▶ We have always done good work and been contributing to an important mission.
- ▶ We all look out for the good of the company.
- ▶ We care about and support each other, and look for everyone to win.

▶ We know how to meet big challenges.

The figure shows how to appeal to those shared values. The aim of a change-message speech should be to show how the change also connects with the values shown in the figure.

The figure exists on a time continuum from past to future in order to take advantage of another premise in adult learning—the need for people to reflect on past experience and then move on to the present and future. Too often, executives focus their enthusiasm only on the future and ignore or even disparage the past. Thus, they miss connecting to the values inherent in employees' experience.

One message-consulting technique is to brainstorm on employees' shared values, similar to the ones in the model. Some useful sources are documents on a company's core values, stories about a company's founders, published reports on past successes, and folklore about the work community—and, if possible, employees' input. Further brainstorming should focus on identifying how an upcoming change connects to the identified values. In that way, we can help executives reframe people's values and connect the new way of doing business to the key values that

supported the old way of doing business. Adding one or two new values is also legitimate—as long as the added values validate old ones.

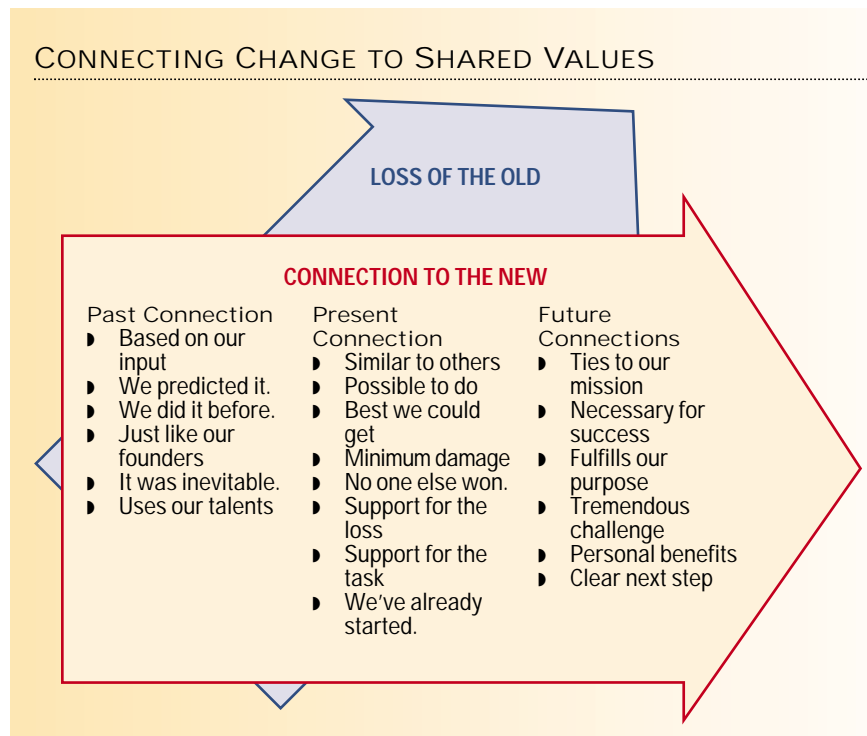
Here's an example of how the ideas in this approach can be translated into an executive's change message. The short version goes something like this:

"You know, this transition we're going through isn't all that different from what we have experienced in the past. It's an inevitable change. Many of you even predicted it. In fact, we based our decision on your input. Furthermore, it's just like what our founders did during their first downturn and what you yourselves did just last year. This is another opportunity to use the talent and experience we developed at that time.

"Actually, we should consider ourselves lucky. In comparison with what others like us are going through, this is relatively painless. We're doing what's possible and is the best we could expect under the circumstances. We are doing everything we can to minimize damage and make sure that no one group wins at the expense of others. In those unavoidable cases, we have provided the best possible support. We've also provided the maximum support for those of you staying, so that you can do the new work. The good news is that you are already doing it. Let me cite some examples....

"As for the future, I've heard some people say that the new direction isn't in keeping with our mission. I don't agree. I think our real mission is... and that what we're doing is absolutely necessary for the success of the company and its mission. Here's my vision of how the change fulfills our purpose.... If we accomplish that, I think we can all be proud. It will be a tremendous challenge, but I think we can do it—just as we have met challenges in the past. If we succeed, there will be a profusion of benefits—to ourselves, our customers, and our community. Let me conclude by pointing clearly to the next step. It's not that far away or hard to accomplish. Working together, we will reach this and all the next steps of our proud march from the past into the future."

Contributing our services  
It's one thing to know how to improve



a change message and quite another to get an executive to take you up on it. So, the question is: How can we position ourselves to influence the change messages in our organizations? And even if executives don't use our advice in their speeches, what else can we do to enhance the learning value of a change message?

First, we have to be confident about our ability to add value to the message. Based on that confidence, we can volunteer to write executive speeches or at least develop an outline. As soon as we hear that a change is being announced, we can create a list of employees' concerns (in the form of questions) and submit it to executives for consideration. Providing some answers to the questions is a plus.

Executives tend to repeat their speeches. So, there's an opportunity to provide feedback and suggestions for the many times that an executive will make the same speech. The best advice is not to write the speech but to recommend one or two additions. We might say, "Here's an idea that can help a lot of people understand what you mean."

Even if we can't influence an executive's delivery of a change message, we can influence how people will hear it. One idea is to review the message at the beginning of a course or as part of a team meeting. Those are opportunities to address questions left unanswered by the executives. Writing articles and course inserts are other opportunities to address trainees' concerns. Discussing a change message in the training room is a way to test how well people understand it. Feedback based on what people actually say is useful input for an executive's next iteration of the message.

Another opportunity is to invite executives (or their lieutenants) to a training activity and have them restate the message to kick off the session. We can use that opportunity to help pose employees' real questions—both before and during the delivery of a change message. Nothing prevents us from communicating employees' quotes and insight in the next session, article, or insert.

An effective change message will have no effect if the music stops too soon or the tune changes. John Kotter

of the Harvard Business School says that undercommunication is one of the principal reasons that change management fails. He says, "In more successful transformation efforts, executives use all existing communication channels to broadcast the vision."

A service of the training function is to bring "learnability" to the message through the change process. If we can influence the message's content through learning objectives, employees' questions, and value connections, that's wonderful. Even if we can't, it's still a service to refresh, reinterpret, and reinforce a change message in every relevant event as we expand our role through the steps of the change management process. As change accelerates in organizations, trainers and HRD professionals will become increasingly involved in facilitating the change process. In addition to providing the follow-up training, we can bring our learning expertise to the front end of the process. An important contribution is making the message easy to learn. ■

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