The Business Analyst as an Organizational Change Agent

Building Business Capability 2017

November 10, 2017

Why are you here?

- Understand how to motivate change
- Incorporate techniques to create change
- Use your position to advocate for change up and down the organization's hierarchy

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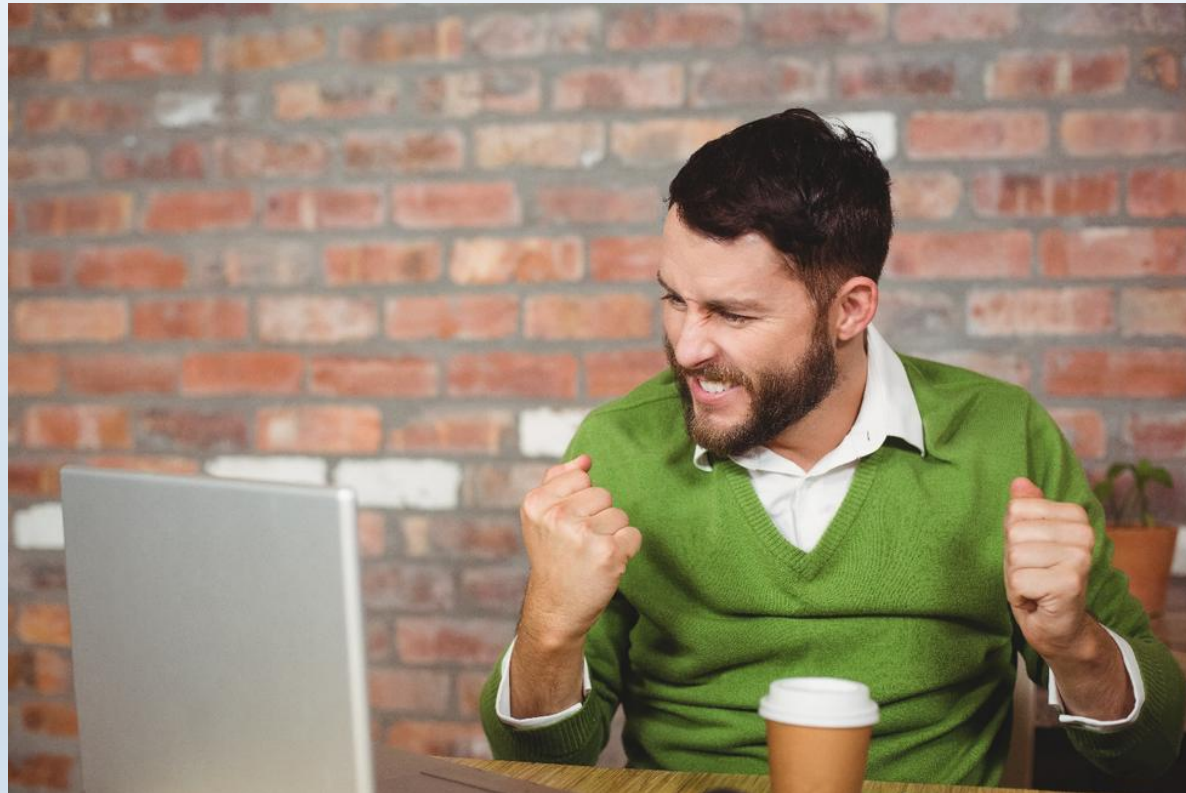# Why do we need change?

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What determines project success?

- Good requirements?
- Skilled developers or architects?
- Good training?
- Great end user experience?

User Adoption!

What drives Adoption?

- User experience
- Solution Confidence
- Management support

Changing User Experience: Staff Empowerment

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Org 1 Scenario

- Implementing new enterprise software
- Customer Service staff averaged 20 years of service
- Failed enterprise implementation 4 years earlier
- Very low staff skill level and investment
- Distrust between staff and IT
- Negative cultural environment


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Org 1 Analysis

- What do we need to create individual solution adoption?

- How do we empower staff?

Org 1 Solution

- Gain management support for staff empowerment
- Communicate with consistent and enthusiastic positive messaging
- Use every opportunity for exposure and training
- Develop each individual to their potential
- Identify and develop leaders within existing groups
- Provide constant positive feedback on progress

Transtheoretical Model of Behavior Change (TTM)

Maintenance

Action

Preparation

Contemplation
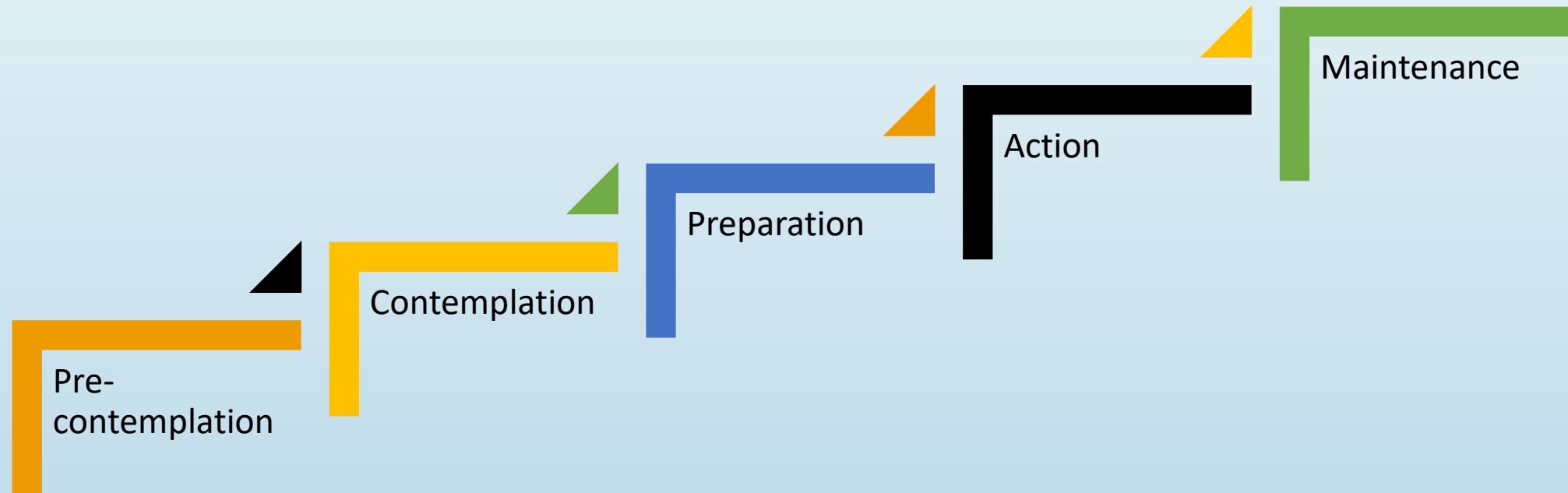
Pre-contemplation

Name that Stage!

- Pre-contemplation

- Contemplation

- Preparation

- Action

- Maintenance

1. A user comes to the first requirements meeting and says, "I really don't know why I'm here. The old tool didn't work, and this one won't either."

2. A manager requests a new process review saying "We have new folks who have tried a few new ideas, and we need some training, but I need help figuring out where to start."

3. When you are re-evaluating a solution 6 months after implementation, users tell you that the department is running well, and things are pretty stable.

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Org 2 Scenario

- IT and Executives decided to move to a COTS product from a custom enterprise solution
- Users had very little access/input into initial requirements meetings
- Call Center staff worried about increased workload
- Accounting and Marketing needed huge customizations, but were not consulted
- IT staff had no confidence that the new product would meet user needs

Org 2 Analysis

- How do we get staff to accept the choices management has made?
- How do we make the solution effective for both staff and management needs?


"I don't want to change. I want all of you to change!"

Org 2 Solution

- Advocate for user involvement
- Demonstrate solutions to prove that process and tool will work
- Use excellent listening and analysis skills to ensure minimum needs are met
- Build trust with empathy and honesty
- Communicate management's goals
- Find and communicate 'What's in it for me'
- Increase self-efficacy and control with preparation

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Techniques

- Deep listening skills
- Building empathy and rapport
- Managing difficult communications
- 'Next-level' analysis skills and creative solutions

So Why the BA?
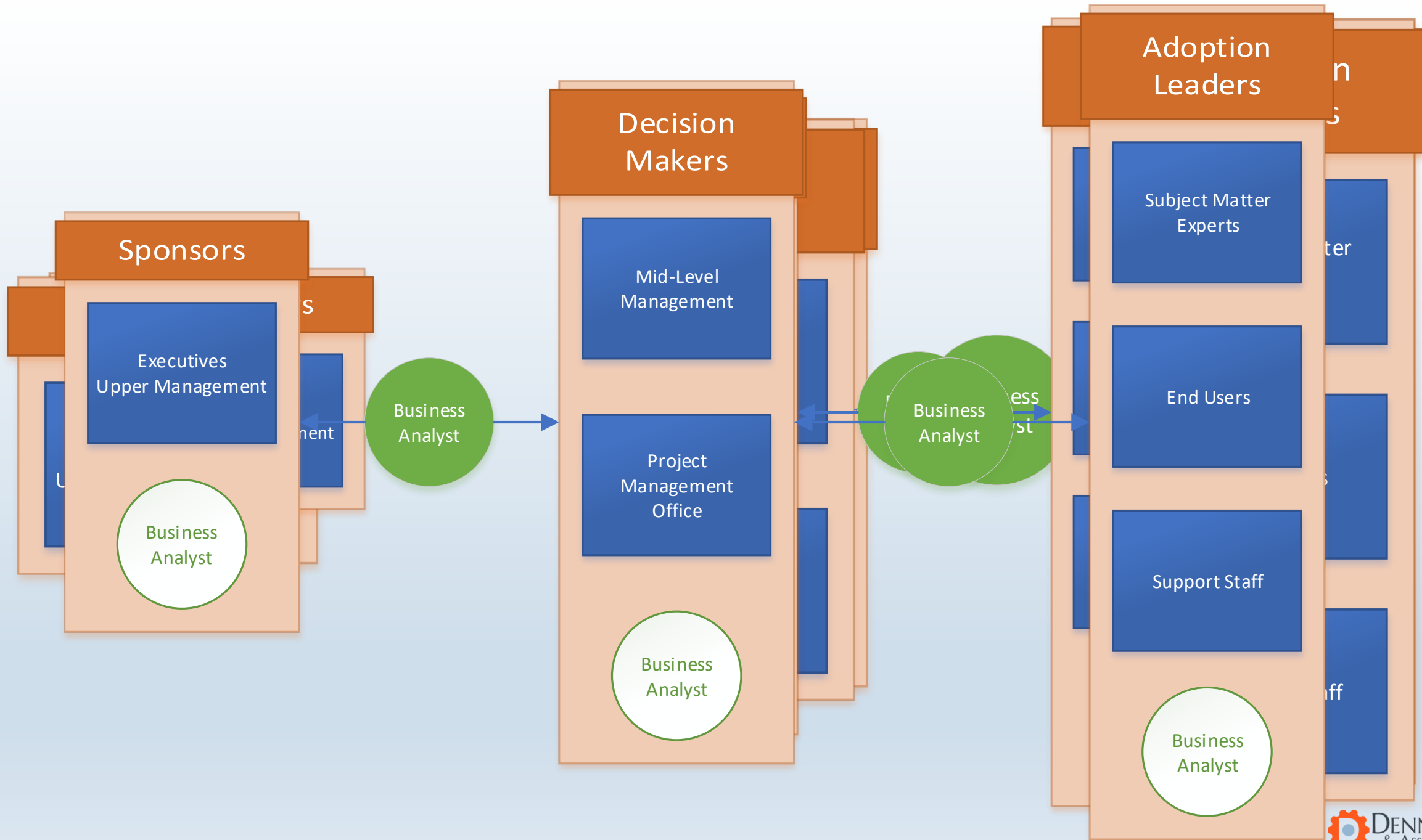
Changing Management Support: Advocate Up

Org 3 Scenario

- IT wanted to upgrade and re-implement existing enterprise solution

- Staff had lost faith in product and vendor

- Management support for staff was very low

- Customer service staff workload was overwhelming

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Org 3 Need

- How do we convince management that staff need more support?
- How do we convince staff to support the solution?

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Org 3 Solution

- Demonstrate competence to repair impressions
- Work through cognitive distortions
- Build business cases for staff needs
- Identify solution that best fits all needs
- Facilitate communication up the chain by advocating *for the solution*
- Offer strategic value with whole-org solution

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Techniques

- Meeting facilitation techniques to restore confidence and demonstrate competence
- Requirements gathering based on data to define actual needs
- Strategic analysis to determine best org solution
- Communication tailored to different audiences
- Understanding how to drive value through business analysis efforts

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Advocate Up

Scenario:

- Users spend a lot of extra time on data entry.
- An automatic ETL tool is available to reduce some of this work
- The tool would require a license fee and 8 weeks implementation, with a small ongoing maintenance cost

Build your case:

- What do you need to know?
- What is the value to the users?
- What is the value to management?
- How do you communicate that?

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In Practice...

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Caveats

- Remember, change is non-linear
- Resistance is the normal state – expect it
- A little psychology, a little therapy, and a lot of empathy
- Sometimes change comes after you're gone
- Sometimes you will fail

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Effecting Change

- Meet them where they are
- Identify the point of most resistance
- View the change from their perspective
- Address resistance at an individual level
- Consistently work to overcome that resistance, using every technique you can
- *Genuinely care about stakeholder outcomes*

Questions?

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