

The Practitioner's Guide to...

Essential toolkits for communicating change

Practical guides, templates and techniques for communicating during transition

Developed from Melcrum's ground-breaking research report
Delivering successful change communication



In this report:

- › Designing a change communication strategy
- › Choosing the right tactics
- › Using storytelling in the process
- › The role of leaders during transition
- › Communicating lay-offs and cost cutting
- › Identifying key stakeholders
- › Preparing your team to support change
- › Communicating a restructure
- › Assessing the emotional impact of change
- › Measuring change communication

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Global research and training for internal communicators

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Toolkit 7

Developing a change toolkit for managers

The guides in this toolkit are designed to help you support managers in their day-to-day communication with their teams during change.

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Developing a change toolkit for managers

The following information, based on the expertise of Liz Guthridge, founder of Connect Consulting Group, will help you develop a toolkit for managers, to guide their communication with teams in the midst of unsettling change.

A toolkit designed to guide managers through change and uncertainty should aim to:

- Motivate managers to take actions to help themselves and their employees.
- Give managers confidence to gain control over their situation – at least the issues they can control – so they can effectively lead their employees.
- Engage managers so they will work to engage their employees, primarily through more personal communication.

1. Toolkit preparation

Interview managers

Ideally, before you start work on your toolkit, you should interview a mix of managers and ask them a series of questions, such as:

- What are the biggest challenges you're facing right now in leading your people?
- What's keeping you up at night in terms of your managerial/leadership duties?
- What do you consider your Achilles heel to be in terms of your ability to lead your people?
- Who or what could help you?
- If you had a magic wand with three wishes, what would you wish for to help you lead better?
- What are the most difficult questions that your employees are asking you?
- What are the most frequent questions that your employees keep asking you?

Prepare a "strawman"¹

Recognizing that you may not have the time or resources to interview your managers in advance, you may want to follow another approach to develop your toolkit. In this case, prepare a strawman¹ outline based on your goals for your toolkit. These may include the goals listed in the introduction, or other goals and objectives that you've developed.

For example, your strawman outline could include the following:

- Introduction: the business case for this toolkit.
- Why you and other managers/leaders need to act now; inertia is not an option.
- How the toolkit can help you, including how you can use it immediately.
- Toolkit contents, which can be:
 1. Key messages.
 2. Five ways to lead your people effectively through troubled times. (Note: Consider a minimum of three ways if you have leaders with a short attention span and are concerned about their ability to comply. The maximum should be 7 to 10 because it would be taxing for managers to follow through on so many directives along with their other obligations.)
 3. Suggestions on how to maintain your momentum.
 4. Frequently Asked Questions (FAQs).
 5. More resources. (Note: This can include resources both inside and outside of the company. For example, mention company communications and HR reference material about related topics. Suggest websites, articles, books and videos on similar topics. Add the caveat that these are supplemental, not required, reviewing and may have a slightly different point of view than the company information, but nonetheless may add value.)

Note:

1. Wikipedia describes a strawman as follows:

A “straw-man proposal” is a brainstormed simple business proposal intended to generate discussion of its disadvantages and to provoke the generation of new and better proposals. Often, a strawman document will be prepared by one or two people prior to kicking off a larger project. In this way, the team can jump start their discussions with a document that is likely to contain many, but not all the key aspects to be discussed.

Vet questions for toolkit outline

Once you have developed an outline – preferably a detailed outline – vet it with several individuals, including:

- Influential managers who are critical to the company’s current performance and those who are viewed as both the formal and informal leaders in the company.
- Up-and-coming managers, especially those new in their role.
- Individuals who are in spheres of influence, such as specific HR roles, including Learning and Development and in Business Units with influential managers.

During the vetting, ask these individuals to review the outline and ask them such questions as:

- What’s effective from your perspective?
- What could be improved, especially in terms of being clearer, more explicit, more useful?
- What’s missing?
- What do consider the key messages to be? (Note: This will help you assess whether the readers agree with your intent.)
- What’s the call to action? How easy will it be for you to take these actions with your people?

2. Developing the toolkit

You’re now ready to develop the toolkit. Before you start writing, decide if your toolkit will be online or print. Also be aware if your toolkit champions – such as the HR and communication leaders – have any specific concerns that you need to address either in the writing or approval process.

Then start to work. Strive for writing that’s easy to read, even skim. Avoid jargon. Remember that the subject matter covers topics that many managers may not regularly encounter during work – unless they’re interested in self-improvement issues. The material needs to be inviting, grounded in reality and easy to apply. You don’t want anyone to think they accidentally stumbled into a therapy session.

3. Distributing the toolkit and follow-through

Take some time to consider how you want to distribute the toolkit. For example, should the CEO or one of the respected leaders announce it? Do you have the resources to introduce it through a webinar or managers’ meetings where someone can walk through the toolkit and explain how to use it? Should top leaders set expectations for how quickly managers should review the toolkit and start to apply the tools, tips and techniques? How will managers be held accountable for using the toolkit?

Also, think about how you want to help managers keep the momentum going, once they start using the toolkit. For example, do you provide:

- Monthly communication tips. These tips could be short (150 words or fewer) that you can post on the manager portal or intranet. The tips could vary between being self-contained and linking to other reference tools. You also could supplement these tools with more questions and answers.

- Quarterly podcast series. You could prepare and post quarterly podcasts featuring managers talking about their experiences using the toolkit, as well as success stories and challenges working with their employees.
- Refresher webinar. If business challenges continue, you could conduct a webinar that highlights key tools, tips and techniques that are especially appropriate based on your current business situation. You also could include a question-and-answer session.

Critical success factors

In preparing and creating the toolkit, follow these five critical success factors:

1. Get into your managers' shoes as you start planning. Think about their level of experience, the challenges they face in a normal work situation and now in a hyper-sensitive setting.
2. Include new information that they can't find elsewhere. Be sure you're providing information of value that fits their needs and their work situation; not basic information they could find on their own.
3. Relate all the information – especially the new information – to their current situation. Put the information into the context of their job, their challenges and the issues the company is facing.
4. Be explicit in the "call to action". Articulate very clearly what you expect managers to do once they review the toolkit. This includes both the actions and the timing. Clarify their accountability, including stating how you will measure their performance – if that's the case.
5. Provide options. Don't expect that everyone will want to do everything you've described in the toolkit, especially if some of these actions are way outside their usual comfort zone. Be clear on what they must do and what's nice to do. And on the nice to do, confirm that they can add their own spin.

Case-study example

In the following case study Liz Guthridge explains how these concepts and practices all came together inside one client organization.

Setting

During the first quarter of 2009, one of my clients – a global high-tech company – asked me to help them develop a manager toolkit on leading employees through the economic downturn. The company has thousands of managers, many new in their role. Most of them lead virtual teams. Team members can be in different countries, in office settings or home offices. Also, many managers and employees speak English as a second language.

Situation

In recent years, the company has not spent much time or resources on manager training or communications. The company has tended to include managers as part of the all-employee audience for employee communications. There is one exception. When HR needs managers to take some type of action, managers receive an urgent email message from HR requesting a quick response.

Just as the economic downturn hit, HR was revitalizing its manager communication efforts, recognizing that managers were a critical audience to help engage employees. Quickly,

though, HR Communications faced new challenges with its messages for managers and employees.

Because of the economic environment, the company decided to freeze all levers managers generally have for recognizing and rewarding employees. Until told otherwise, managers cannot grant pay raises, bonuses or promotions. Nor can they give spot bonuses or any monetary incentives or rewards. Training and travel budgets also are frozen.

About the only lever managers have right now to engage their employees is communications. To help managers communicate better – especially in the personal way that's needed for these times, they need some basic help. The main focus of the toolkit is to help managers lead effectively by communicating more personally.

Solution

Through discussions with the HR communication staff, we decided on a short and punchy toolkit with these sections:

- Introduction, including what we do know and what we don't know (we don't know the length or breadth of the downturn; we do know what the company's strategic goals are).
- How you and other people managers can help:
 1. Work the levers under your control to achieve the company's strategic goals.
 2. Keep customers, internal and external.
 3. Lead your employees by communicating personally.
- How to use this toolkit.
- Three key messages about leading your employees.
- How to communicate with your employees; be personal, not just professional, in communicating with your team and take these five actions:
 1. Hold regular team briefings/problem-solving sessions.
 2. Reach out to team members.
 3. Ask questions and listen to the answers.
 4. Be a coach.
 5. Show your appreciation.
- Celebrate wins and reinforce them through recognition
- Questions and answers.

The toolkit would be posted on the manager portal, so each section needed to be brief and to the extent possible, stand on its own with appropriate links to the other sections.

Because a significant percentage of managers consider English their second language, it was important to make the toolkit easy to read. You can see how the toolkit rated against other HR communications at the company in Figure 7.1, page 44.

Fig 7.1: How the manager toolkit rated against other HR communications

Microsoft Word Readability Scores	Manager Toolkit on Leading through a Downturn	New HR Communications Writing Standards	Historical HR Communications
Passive sentences	2%	<20%	10-35%
Reading ease	64.4	>40%	<50%
Grade level	7.9	10.7	>10

Once HR approved the content for the toolkit, an HR communications staff member loaded it into the manager toolkit template and posted it on the manager portal. The HR communication staff next sent an email to all managers notifying them of the toolkit's existence and encouraging them to use it.

Within one hour of the email message going out, the HR communications staff had received four messages on the portal from managers thanking HR for the toolkit, and complimenting them on its usefulness.

In a few months, the company will conduct its annual employee survey. The plan is to include at least one question about the toolkit. Any pulse checks the company is able to do with managers also will ask about the toolkit.

Meanwhile, managers have tools they can use to help them personally and professionally build trust during troubled times.