

## The Advisor

Organizational Effectiveness News & Trends

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### Five Key Actions for Sustainable Change



Do you have a business success story you'd like to share?  
Please email me and let me know!

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What is the best way to initiate change in your organization? Do things go smoothly and yield the business benefits you promised? Or, do change initiatives lead to frustration, cynicism, and cost- and schedule-overruns? Every organization has its own unique formula for successful change. The key is to discover it, use it, and improve on it. Learn five key actions you can take today to start off right and ensure success ð

#### • **Five Key Actions for Sustainable Change**

##### The Challenge

ClearPath Alliance was engaged by a client to help accelerate a culture change in their organization. Their ability to deliver core services was being strained by growing demand, while managing risk. Within six months, we helped them develop a new operating model, a fact-based business plan, and engage the senior leadership team and a dozen change ambassadors to take the organization to the next level. Read on to see what was done and how you can benefit too.

##### The "Why" - Clarify the Need

The client's business was information security and business continuity. Ensuring secured transactions was paramount to their company's brand, client trust, and regulatory compliance. Our first step was to help them build the business case, including:

- Identifying critical gaps and prioritized improvement opportunities
- Ensuring key leaders and staff agreed on what was to change and why
- Conceptualizing the change and ensuring alignment with corporate objectives / priorities
- Clearly defining the business benefits of the proposed culture change
- Identifying the Champion(s) with a stake in the outcomes

##### The "What" -- Determine Capability and Choices

An organizational assessment determined what was valued, rewarded, and how work got done. A cross-functional team of

ClearPath Alliance partners with senior executives in corporations and high-growth companies to improve profitability, execute change, and develop top talent.

We help you get work done and improve the tangibles: Revenue, Margins, Cost, Quality, Speed, and Risk.

internal experts collected market research, interviewed customers, and distilled key themes. Options and recommendations were developed for review with the senior leadership team, including: changing the organization's culture, core processes, and structure. ClearPath Alliance provided a managed change methodology, advice and council to the Project Champion, and facilitated off-sites which helped the project team:

- Agree on shared goals and deliverables, and get grounded in the business
- Review internal lessons learned from prior successful change projects
- Assess the current state and identify gaps and opportunities based on collected data
- Define a proposed desired future state with clear outcomes and deliverables
- Manage and meet stakeholder expectations and conduct timely check-point reviews

#### **The "How" - Create Actions that Count**

Four strategic imperatives were identified and focused on: managing risk, developing associates, and protecting customer information and privacy. Phased initiatives would close key gaps, enable new capabilities, and optimize resources. Dependencies with corporate initiatives and anticipated business benefits were identified, including impact on: financial, risk, compliance, and enablement of business objectives. Key success metrics, assumptions, and total estimated costs and funding sources were also identified.

#### **Accountability -- Continuity for Success**

After vigorous debate and refinements to the business case, the leadership team endorsed the team's recommendations. To ensure ownership, engagement, and visible support, each member of the leadership team was asked to lead a strategic imperative. An annual refresh process was designed to ensure sustainability. A new project team would be formed to validate and test the latest market research and evolve the action plan.

#### **Actions to Take Now!**

To recap, five actions you can take today to more effectively drive change include:

- 1) Clarify the need for change, benefits/impacts on the business, and who is the Champion
- 2) Plan smart, use resources wisely, and run the business while changing
- 3) Use a cross-functional team to assess, develop, and execute the transition plan
- 4) Review prior internal change projects and determine key success factors
- 5) Identify critical dependencies, timing, and sequencing, as well as a check-up process

Running faster down the same road will not get you where you want to be. Exceptional companies focus on the shifting landscape of tomorrow and the priorities of today. Start now!

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- **Next Steps**

Do you need to improve your organization's ability to better manage change, execute strategy, or develop top talent? Call us at 858-292-5361 for a consultation.

The "Organizational Survey" is another great way to quickly determine the health of your business. Click on the link below to download a free survey and conduct your own confidential self-assessment.

**Organizational Survey**