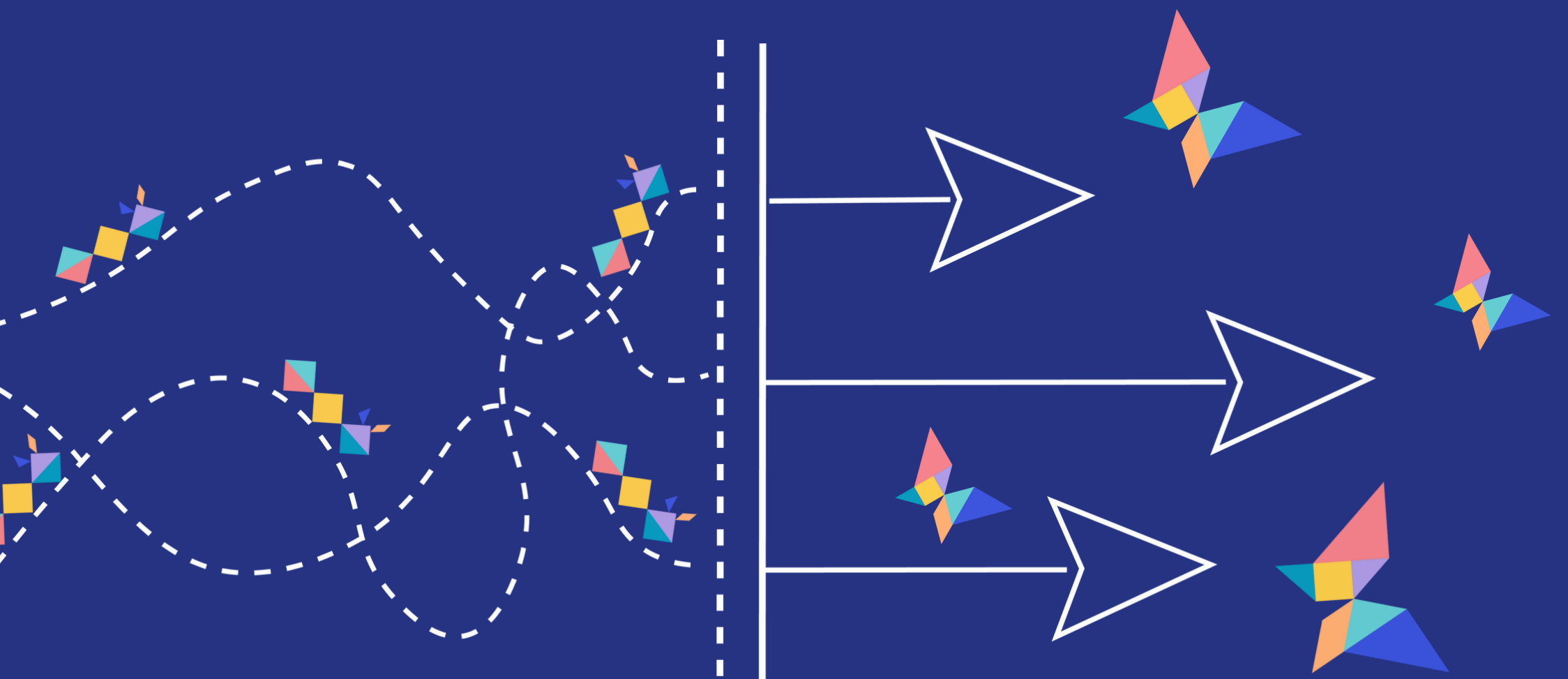runn

Leading Change in Resource Management

A Guide to Successful Resource Management Transformation

Brought to you by Runn (and our expert friends)

This ebook is inspired by and builds on Runn's webinar Leading Change in Resource Management – part of our LEAP educational webinar series for resource management professionals.

The webinar includes expert insights from Rahul Sirimanna, Kent Frazier, and our own Runn team.

Watch the webinar now without registration.

Rahul Sirimanna

Director of Delivery Excellence at RBC

Rahul Sirimanna is a Director of Delivery Excellence at Royal Bank of Canada. He is a results-driven and personable professional with years of operational and transformational experience in risk management and finance. He has a proven track record of leading cross-functional strategic initiatives and unlocking sustainable business value. Rahul specializes in strategic portfolio management, financial planning, risk management, and change enablement.

Kent Frazier

Co-Founder and CEO of ParadoxEdge

Kent Frazier is a former HR Executive now serving as the Co-Founder and CEO of ParadoxEdge, a transformational coaching and consulting practice, creating more Fully Human workplaces. Kent has carved a niche in developing leaders of change in the messy middle of getting hard things done. He offers a deliberately developmental, practical way of building trust, harnessing creative tensions, maximizing collaboration and creativity, and driving results in high-stakes scenarios.

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Introduction

Businesses today navigate a volatile market that shows few signs of calming down. Companies are eagerly trying to become leaner and more efficient, even if that means losing valued employees.

However, savvy organizations are starting to realize that other options are out there: strategic resource management can help guard against the worst of the financial headwinds and provide avenues for sustainable growth - even in adverse conditions.

But for many organizations, harnessing the potential of resource management has to wait until some evolution has taken place. If you've never shined a light on how resources are managed in your business, you may be surprised to find a plethora of processes, policies, and strategies that are not fit for the future.

Indeed, even if your business is familiar with resource management, an audit of the systems in place might still reveal that big changes are needed.

And that's what this guide is all about, because managing change can be daunting. But don't fret - you're not alone.

We're here to provide expert advice and best practices to support you through resource management change, as well as insights into the type of transformation initiatives you could soon be leading.

01

What's on the horizon for resource management?

Traditionally misunderstood, undervalued, and under-invested in, resource management is finally starting to escape the shadow of its more established sibling, project management. The discipline is becoming recognized not only for optimizing resource allocation but for its strategic role in driving business revenue and profitability.

The Resource Management Institute calculates that a 1-point increase in resource utilization can create over £1,000,000 uplift in revenue each year. If that's not a reason to raise your resource management game, we don't know what is.

According to the Resource Management Institute calculation

> **A one-point increase in utilization**
> **=**
> **£1m+ extra revenue in businesses with 300 employees**

A 1-point increase in utilization on a full-time resource working 40 hours a week = **20.8 additional billable hours per year.**

Assuming a bill rate of $200 per hour, that 1-point increase represents **an additional $4,160 per year per person.**

Multiply that by the number of billable staff – say 300 people – and that utilization boost is worth **$1,248,000 in additional revenue.**

After all, the current business environment presents enormous financial challenges. And yet, despite this, leveling up resource management is a low-hanging fruit that many organizations have barely touched.
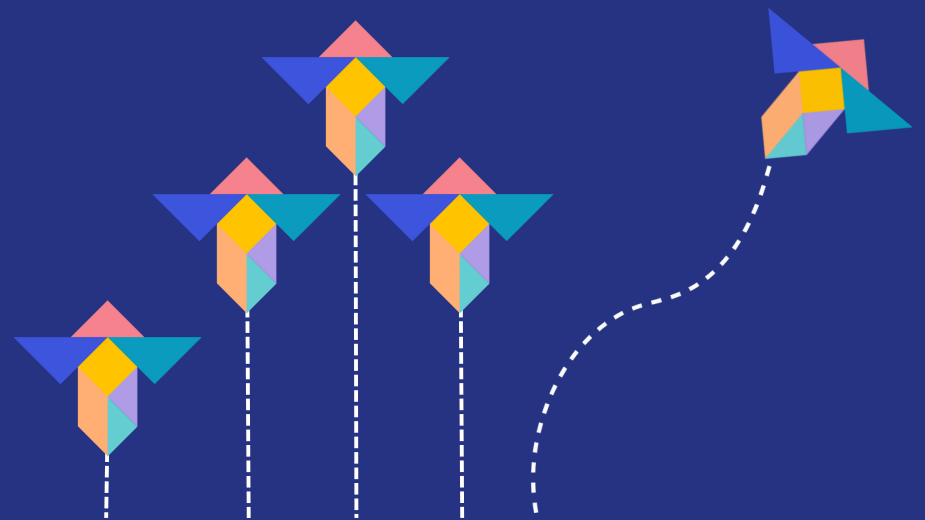
But now that resource management has secured its spot on the C-suite agenda, professionals in the field must prepare for impact. Awareness inspires ambition, which means resource management transformation could be on the cards.

We predict that calls for change will come thick and fast, and soon.

02

Resource management: What changes might you need to lead?

As resource management gathers momentum as a discipline and gains recognition for its strategic significance, you may find yourself at the forefront of a change agenda.

Forewarned is forearmed, so here are some of the most common transformation initiatives you might be tasked with leading – from minor initiatives like introducing time tracking to major advancements such as implementing a Resource Management Office.

Introducing time tracking

What's involved?

Implementing systems or processes to accurately track the time spent by employees on various projects and tasks.

Why it's needed?

In a project-based business model, time is literally money. You need to make sure you're spending it wisely. Time tracking ensures billable hours are effectively utilized, and projects are delivered on schedule and within budget.

Time-tracking also provides vital insights into resource allocation, forecasting accuracy, and workload levels – which improves everything from utilization to employee wellbeing.

Challenge level
Low to intermediate

Introducing time-tracking processes and technology isn't usually difficult in itself – you need to select a tool, implement it, and provide training. The challenge comes from potential resistance to the change.

Tips

This one may need careful handling. Overcome resistance and suspicion by clearly communicating the purpose and benefits of time tracking. Reassure that it isn't Big Brother-style surveillance, or the first step towards redundancies, as people may fear. Explain that the aim is to optimize utilization, identify capacity, prevent burnout and boredom, forecast better, and invoice more accurately.

Lead by example
We've got lots of tips on this – like getting senior managers to lead by example, track their time, and share it. Discover more about how to introduce time-tracking without alienating employees.

Process transformation

What's involved?

Redesigning resource management processes to improve efficiency and effectiveness – such as how resources are allocated, projects are prioritized, change requests are managed, resources are developed, etc.

Why it's needed?

Process development is never "one and done". Regular review is needed to ensure that they remain fit for purpose and current, making use of newly available technologies. Redesigning your processes can increase efficiency, accelerate workflows, and ensure you're focusing your efforts on all the right things.

Challenge level
Intermediate

You can tackle individual problem processes to deliver targeted improvements over time or undertake a wholesale review to address issues concurrently. The latter approach will be more challenging. We recommend prioritizing high-impact processes and quick fixes first.

Digital transformation

What's involved?

Transitioning resource management from manual paper-based processes – or spreadsheet-based management – to a dedicated resource management platform.

Why it's needed?

Managing resources in spreadsheets simply isn't sustainable – or scalable. Spreadsheets are inherently inefficient and error-prone, and once your organization has grown beyond the 'two pizza team' size, you'll really start to notice how manual management processes cost you efficiency and opportunity.

In contrast, a resource management platform minimizes the admin burden and uses live data, ensuring real-time visibility into resource allocations. Instant data visualization provides actionable insights at a glance. And they typically include project scheduling and management tools too, meaning you can drag-and-drop resources directly into project plans.

Challenge level
Intermediate

You'll need to define your needs, shortlist solutions, and do demos. However, once you've selected a product, a good vendor will support you through the process of onboarding to their platform.

Then you'll need to organize and provide your data for them to upload, check system configuration and performance, and roll the software out to your colleagues. This last stage will involve training, troubleshooting, and ongoing support.

We get customers up and Runn-ing fast
Runn's implementation team helps customers graduate from stifling spreadsheets to our powerful resource management platform in no time. Learn how we ensure customer success in this interview with our senior implementation manager, Brian Naylor.

Tips

If you're using spreadsheets to manage your resources, you might find yourself pushing on an open door here. Highlight how resource management software holds massive potential benefits for everyone – making allocations easier for overstretched project managers, balancing workloads for resources, and equipping senior leaders with data insights for confident decision-making.

Centralizing resource management

What's involved?

Consolidating all resource management activities, data, and decision-making processes into a centralized system and/or team.

Why it's needed?

Resource management decisions are often decentralized – which just means different teams do their own thing. As a result, standards may differ between departments, resource clashes between teams can still occur, and you're probably not achieving maximum utilization.

Centralizing resource management enhances visibility, coordination, and control at an organizational level. This leads to better resource allocation, prioritization, and utilization, which means better outcomes for everyone. Plus, when every team adheres to the same policies and processes, best practices are embedded across every team, raising overall quality and outcomes.

Challenge level
Advanced

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There's no sugarcoating it, centralizing resource management is a challenge. You'll have to align diverse stakeholder interests, integrate different systems and data sources, and provide comprehensive training and support to ensure successful adoption and implementation.

Tips

Begin with a comprehensive analysis of current resource management practices to identify inefficiencies, duplication, and best practices. Engage stakeholders early to gain buy-in and establish a clear business case and roadmap for centralization. To address concerns, highlight benefits like streamlined operations and improved collaboration.

Implementing a Resource Management Office (RMO)

What's involved?

Establishing a new business function to oversee and steer centralized resource management.

Why it's needed?

[The benefits of setting up an RMO](#) are similar to the benefits of centralizing resource management generally. But establishing an RMO (Resource Management Office) brings additional advantages beyond those of centralizing resource management alone.

An RMO provides dedicated staff and expertise to oversee centralized resource management processes, ensuring focused and expert attention on resource utilization and optimization.

Challenge level
Advanced

■■■■■

Setting up an RMO has the same challenges as centralizing resource management. But with the added challenge of introducing non-billable staff to the workforce, recruiting, training, and managing them.

Tips

You can justify the introduction of non-billable staff by using the RMI's ROI calculator to show how much extra revenue their work could generate, simply by increasing existing resource utilization.

Setting up an RMO from scratch
Tasked with setting up a Resource Management Office – or want to make the business case for one? Download our expert-informed guide [How to Successfully Grow the Resource Management Function](#). It's packed with actionable advice from Laura Dean-Smith, Director of Resource Management at Clarivate. Or [watch the webinar now](#).

03

How Royal Bank of Canada implemented change in resource management

Recently, Royal Bank of Canada has introduced a major strategic change, implementing Runn resource management software across their global workforce. This move was part of their broader effort to enhance resource management efficiency and reduce costs. Rahul Sirimanna, Director of Delivery Excellence at RBC, shared insights from this successful project during our webinar – Leading Change in Resource Management.

Royal Bank of Canada
- Financial institution, founded 1865
- 97,000+ staff, 700 in internal audit
- Based in Montreal, Canada
- Operates in 30+ countries
- www.rbc.com

Challenge
Following rapid growth, RBC needed more internal resources to support their internal audit processes, and less reliance on costly external consultants to meet demand. They also wanted to reduce burnout and turnover at a time of high talent mobility and competition during the pandemic.

Strategy
RBC's strategy involved reducing costs and improving internal resource utilization by increasing visibility into global capacity and facilitating greater mobility within teams. By automating manual tasks and piloting the rollout of specialist resource management software, they aimed to boost overall efficiency.

Rahul Sirimanna highlighted that this digital transformation during the pandemic was more than just enabling remote work; it was a strategic initiative to optimize resource management and reduce costs. His insights provided valuable lessons for anyone looking to lead change in their organization.

The impetus for change at Royal Bank of Canada
Like many businesses, Royal Bank of Canada implemented major digital transformation. It was a strategic move to reduce costs and improve resource utilization, as Rahul Sirimanna explains:

Royal Bank of Canada has been growing at a very rapid pace, especially in the US. That meant heightened expectations from the bank from a regulatory perspective – and this meant we needed resources to meet that demand.

If you recall, during 2020, the pandemic led to a war for talent. There was a huge opportunity for people to move around during that time. And one of the challenges we had was that there was a lot of turnover. So that was one of the key drivers for change.

Naturally, if organizations grow and can't meet resource demands internally, they look externally to bring in resources. So, within our audit shop at RBC, we went to external third parties like the Big Four consulting firms, to see who was willing to basically lend their resources to RBC, to be able to meet short-term demands. But that became very costly...

....So that's the backdrop to the change. We wanted to reduce costs and we wanted to be able to share resources across RBC – specifically, within the internal audit shop. We have around 700 different employees across 30+ different teams. So we wanted to be able to dynamically resource, which would enable us to reduce costs. If there are any resources available on Team A, we want to bring them into Team B, instead of hiring from outside of the organization.

Ultimately, the goal was to reduce costs and increase transparency. But I think one of the byproducts is that people are much happier in an organization that supports them and lowers burnout. So they're more likely to stick around, which benefits the organization overall.

Rahul Sirimanna
Director of Delivery
Excellence at RBC

The change management process

Royal Bank of Canada approached this strategic initiative from a people-centric perspective. They engaged resource schedulers in the research phase to understand the process and its problems. Then enrolled a large number of these colleagues to test the software solution in the pilot phase.

This allowed RBC to get feedback from users so they could iterate and optimize the system before the global rollout. They also leveraged these testers as peer-to-peer advocates for the system, to support engagement and acceptance in the wider business. Rahul explains their people-focused approach:

We started with the user stories – sitting down with individuals who are involved in managing resources within each of our 30+ internal audit teams. We needed to understand their pain points and get to the human element of it. What is really impacting them on a day-to-day basis? What is the process they have to do to achieve their objectives? Because sometimes it's very cumbersome and administratively burdensome, and we wanted to really be able to understand that.

Of course, resource management practitioners weren't the only stakeholders that needed to be involved. Rahul's team also worked closely with senior management to introduce the software, answer questions, and secure champions on the leadership team.

There's going to be lots of questions from leadership, so we wanted to make sure they felt very engaged in the pilot process as well. You need their buy in and you need them to see the benefits. Because if they don't inherently believe in it, the message isn't going to trickle down to the rest of the organization. One of the key things at RBC was leaders speaking from the heart, being the endorsers, the cheerleaders. There's a lot of buy in when leaders really cheer the team along.

Tips
- Listen to practitioners to understand operational realities
- Engage practitioners in the pilot as testers
- Get senior leaders on-board and endorsing the project

The pilot phase

RBC began with demo-ing different resource management platforms, including Runn. To ensure the chosen product was fit for purpose, they engaged 20 schedulers from across their global teams to take part in the demos.

As a strategic initiatives group, we're just the enablers,' says Rahul. 'The schedulers are going to be the consumer, so it was important they had a seat at the table. Really making the user part of the co-creation process. Saying "These are the pain points you shared with us. Is this tool going to help with that?

To ensure a representative selection of users, Rahul's team invited people from across the organization.

One of the key things we wanted to do was make sure there's representation. And what I mean by that is representation regionally. Because as you know, we're a global bank, we have operations in the US, the UK, Asia, Pacific, the Caribbean, and Canada. So we wanted to make sure that there's representation from each of those regions. Because, the resourcing gets done differently. There are cultural differences between the operations. So we wanted to take those into account

Rahul explains that RBC 'went slowly at first, to go fast later'. Of their 12-month change initiative, they spent eight months on piloting Runn and only three on rollout, which they call 'production'.

We spent a lot of time with the pilot process. A lot of people tend to pilot for four to six weeks and then jump into production. But we really wanted to make sure that we got this right. So we spent almost eight months piloting Runn – from a technology perspective, from a process perspective – making sure we could make the enhancements that we needed to, so it was in the right position for production.
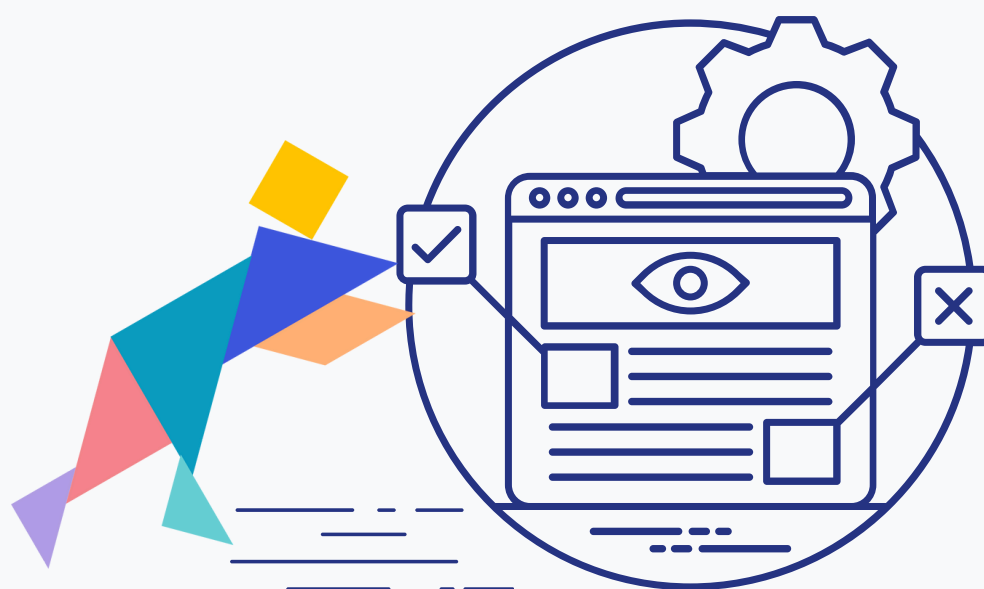
To make sure the testing phase focused on the more strategic elements of resource management, they pre-loaded RBC projects and resource allocations into Runn. This meant that schedulers could use the system to identify real-life resourcing gaps and experiment with dynamic resourcing to fill them.

As a result of using Runn, testers obviously had questions and suggestions about functionality, so RBC took an iterative approach to the pilot.

> *When you start to pilot, people also tend to get questions. So we had a very iterative approach where we would meet with users every two weeks and identify any potential enhancements we want to make before we go into production. That was one of the key things – taking a very agile approach – test and iterate, test and iterate – until we got to a position where people felt comfortable with the functionality.*

Patience was a watchword during this process and Rahul's team worked hard to keep users engaged as their suggestions were being implemented.

> *As we were iterating, we needed to make sure that the pilot users were patient and keep them engaged through the ups and downs of the process, as these enhancements were being made to the tool, to make sure that their feedback was incorporated.*

After extensively testing Runn – and working with Runn's implementation team to customize the platform's functionality to their exact needs – RBC was ready to roll it out to the global business.

Tips
- Give stakeholders and end users a seat at the table
- Ensure representation from all employee groups
- Take an interactive, co-creation approach

The rollout phase

Thanks to Rahul's 'go slow to go fast' approach, RBC were able to roll out the platform relatively quickly. With all of the technical and process issues ironed out during the pilot, their main focus during implementation was marketing, communication, training, and support.

Once we completed the pilots, the scale-up didn't take too long, just three months. It was almost like a flip of a button [because we spent so long on processes and integration during the pilot]. So it was just a matter of just marketing and training folks – and that's what the three months were dedicated to.

In terms of marketing and communication, Rahul's team let their pilot testers do the talking. This was a strategic move, as he explains:

People don't necessarily want to hear from a strategy group or an operations group. They don't find that relatable because we're not the actual users. When you take a user to speak to another user, they tend to relate more. So we took pilot users into our all-hands meetings, into our town halls, and had them speak about their experience with Runn and articulate the benefits it brought to them and how excited they are about the future.

Having won hearts and minds, they took a three-pronged approach to training and support, so users were empowered to use the system successfully. Firstly, reviewing technical support at RBC.

When people are going through change, you want to make sure there's good technology support. So we set up the support model to create a team dedicated to tech support for all applications, including Runn. They became the experts on what's happening in the back end, what's happening on the front end, so they're able to support folks through navigation.

Next, training RBC's resource management lead as a point person for any non-technical user queries.

From a process perspective, we made sure that our resource manager was equipped to be the key person that schedulers can come to, to answer any questions that were related to the process. How can we go about requesting external resources? How can we understand if there's certain availability on another team?

And finally providing self-service support online. 'We also set up sites for people to go and see FAQs and be able to answer questions themselves,' says Rahul.
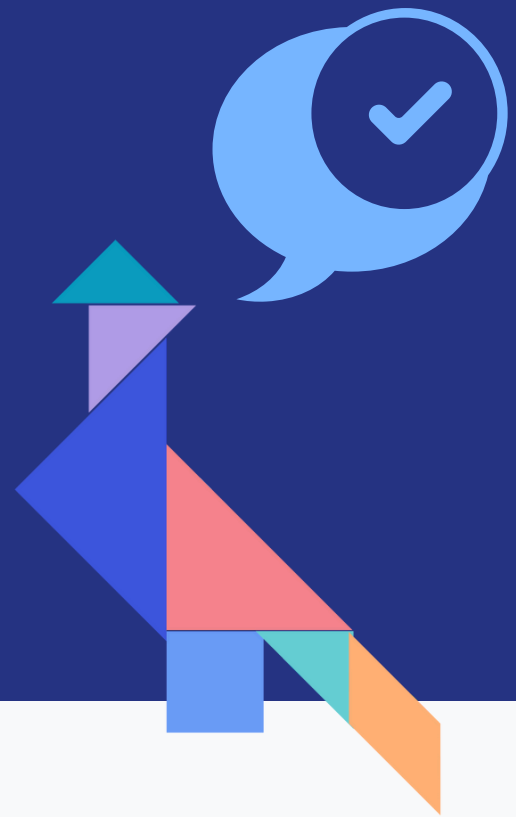
Tips
- Perfect functionality, process, and integrations during the pilot – for easier scale-up
- Leverage change champions as peer-to-peer advocates
- Provide training and support in a variety of formats

04

Leading change in resource management – best practices and expert advice

We've heard a lot of expert advice from Rahul Sirimanna in Chapter 3. During our webinar we also spoke to Kent Frazier, co-founder and CEO of ParadoxEdge, a transformational coaching and consulting practice, creating more fully human workplaces. Here are some of the best practices the pair shared.

Be clear on the 'why'

When people understand the purpose and the expected outcomes of a change initiative, they are more likely to support and contribute to the initiative. So being clear on the 'why' is essential.

At RBC, Rahul was at pains to communicate the 'why' behind the change with stakeholders. And Kent agrees that this was a great strategy for successful change:

> *The first step is being clear on why. Why are we doing this? I heard Raul speak very clearly on this. "We're looking to be able to reduce costs and more dynamically share resources". This provides a really clear purpose and reason why people believe in this initiative.*

He recommends thinking about the FAQs that might crop up and making sure you have an answer for them – and one in particular...

> *People have to be able to answer the question "What's in this for me?" From all those different stakeholder perspectives – from leadership to the end user – we have to have thought through that question that everyone's going to be asking before they can enroll and get on board. If someone can't answer that question, they'll experience more resistance or denial*

But when everyone has a different stake in the initiative, how can you address all of their questions? By listening and using their language to communicate the benefits.

Understand your stakeholders

Change initiatives have a wide range of stakeholders, from senior management to frontline colleagues who'll be impacted by the change. Each of these stakeholder groups has different objectives, concerns, and communication needs. Listening is the only way to understand these concerns and address them.

Get senior buy-in and sponsorship

One of the first stakeholder groups you need to win over will be senior management. Securing a champion on the C-suite will help influence other stakeholders – from fellow leaders to frontline workers.

According to research from change management experts Prosci, 'Having a positive leader who actively guides the organization through change and participates actively in the lifestyle of change' is consistently voted one of the most influential success factors in change initiatives.

One way to win around senior management is to highlight the strategic benefits and ROI. Rahul, for example, was able to show the cost savings associated with more dynamic resource management.

> *One of the things we did as a leadership group within RBC was to align individuals goals – like annual goals and performance goals – to the innovations that we were doing around resource management. I think the tone at the top is very key in that perspective to be able to enable good change.*

Once you've secured buy-in, get a statement of commitment. This ensures senior sponsorship is locked in.

Tell a 'love story of the future'

Leaders can't force people to change; they need to inspire a desire for change. Inspiring others with a compelling vision of the future can ignite passion and commitment. It's the heart side of engaging hearts and minds.

Sharing a positive vision of the future helps stakeholders see the benefits of change and motivates them to work through the inevitable discomfort of change. Kent calls it 'the love story of the future':

We need to articulate the love story of the future that we're holding dear to, as we as we all continue to be in that creative space and work towards that future together. That love story of the future will enable us to get through the inevitable pain and mistakes because it's worth it

Kent Frazier

Co-Founder and CEO of ParadoxEdge

Get comfortable with discomfort

Change often brings uncertainty and challenges. Leaders must embrace discomfort and model resilience, accepting that it's a natural part of the growth process and encouraging others to do the same, as Rahul highlights:

Leaders need to be honest – that it's okay to be uncomfortable with the change. For leaders to know people are uncomfortable and leaders being ok with that. Because change is not easy. So it's about having that trust and honesty from the leaders that you're going to go through some uncomfortable changes - but they'll be for the better in the long-term.

Kent agrees, saying 'I want to underscore that being comfortable with discomfort is rare'. So leaders need to reassure people that it's normal and help them through it.

Build trust with transparency

Building on Kent's point about honesty, leaders who communicate honestly and show empathy for their team's concerns can navigate resistance more effectively. You can establish trust by being transparent about the process, desired outcomes, and the challenges you'll need to overcome together.

Balance patience and persistence

Driving change requires a balance between giving people time to adapt and pushing them forward. Leaders must be patient yet determined, ensuring steady progress without overwhelming their team, as Kent explains:

Raul was touching on patience earlier – needing patience from people as you go through iterations of change. But you need to be persistent too. Too much patience and we get a little lazy and the change maybe doesn't take effect. Too much persistence and maybe we get a little reckless and we're not bringing people along with us. So we always need to balance those two tensions.

Mind your language

The language used in change management can significantly influence perceptions. By adopting positive, inclusive, and forward-thinking language, leaders can shape attitudes and foster a more receptive environment for change.

Leverage ambassadors

Identifying and empowering change ambassadors within the organization can accelerate the adoption process. These change champions can influence their peers and address concerns from a similar perspective as their colleagues.

We've already heard in Chapter 3 how Rahul used ambassadors as part of the marketing and communication process at RBC, bringing them into town hall meetings to champion the change.

One of the key things was the pilot users innately became very engaged in the project – they almost felt like this was their product in the end.

Kent agrees with this strategy:

Find your natural ambassadors within the organization – those who are naturally drawn to the work, interested, and motivated – and adopt them as brand ambassadors if you will. The people who self-identify and volunteer. Get them role modeling the change, doing testimonials, doing videos, hosting show-and-tells.

Listen (and not just to the loudest voices)

Effective change management involves listening to diverse perspectives – and providing ways for all voices to be heard. This helps leaders gain a more comprehensive understanding of the team's needs, leading to more inclusive and effective solutions.

It can be helpful to choose 'hand-raisers' to pilot projects – people who are happy to get involved and share their views, as happened in the RBC project.

'We picked people who were going to be the most vocal to be in the pilot. We needed the folks who are going to be very transparent and very candid,' says Rahul:

> *We then met on a bi-weekly basis to collect feedback. A lot of those sessions were just me speaking for five minutes and then for the remaining 55 minutes, I was just listening. Nine times out of 10, you will find that most individuals will be mentioning the same two or three things that you need to address.*

But it's also important to give more reserved colleagues the chance to contribute, as Kent explains:

> *It's important to have mechanisms to invite those that are a little more quiet to share their voices, so that those perspectives aren't drowned out by those that are always willing to grab the mic. Intentionally gather quiet folks in smaller groups so they don't feel overwhelmed. We've done triads and smaller groups of 10 or fewer. So it's not so overwhelming for those that are a little more reluctant to share in large groups.*

Expect resistance

Resistance is a natural part of the change process. Anticipating and planning for it allows leaders to address concerns proactively, turning potential obstacles into opportunities for dialogue and improvement. As Kent explains:

> *Don't blame people that have a different way of metabolizing change. We have to recognize that human beings – when faced with unplanned, unexpected, or unwanted change – will naturally go through some denial and resistance before we begin exploring the path forward and fully commit.*
>
> *As leaders and ambassadors, we need to listen and let people work through their very natural, normal human resistance and denial of change. Because the world they knew is going away. And if we don't allow people to grieve and work through that, they never really get to that place where they can fully commit to the new.*

Escape the drama triangle

The drama triangle says people will align with one of three roles in a conflict – victim, persecutor, and rescuer. This can perpetuate conflict and dysfunction within teams. Leaders need to help people see they're stuck in this common dynamic and help them escape it if they want to move forward.

As Kent explains, this involves encouraging collaboration and personal agency, instead of blame and rescue behaviors:

During change, people can move into the "Drama Triangle". We're feeling the effect of the change that's being asked of us, we're blaming the people who are making us do this new thing. Meanwhile, someone's invariably going around trying to pretend everything's going to be fine. And we don't really listen to the underlying tensions that are coming up, which just promotes ongoing drama. As change leaders, it's our role to introduce language to shift from blaming to taking responsibility, and from fixing problems to coaching people to solve their own issues.
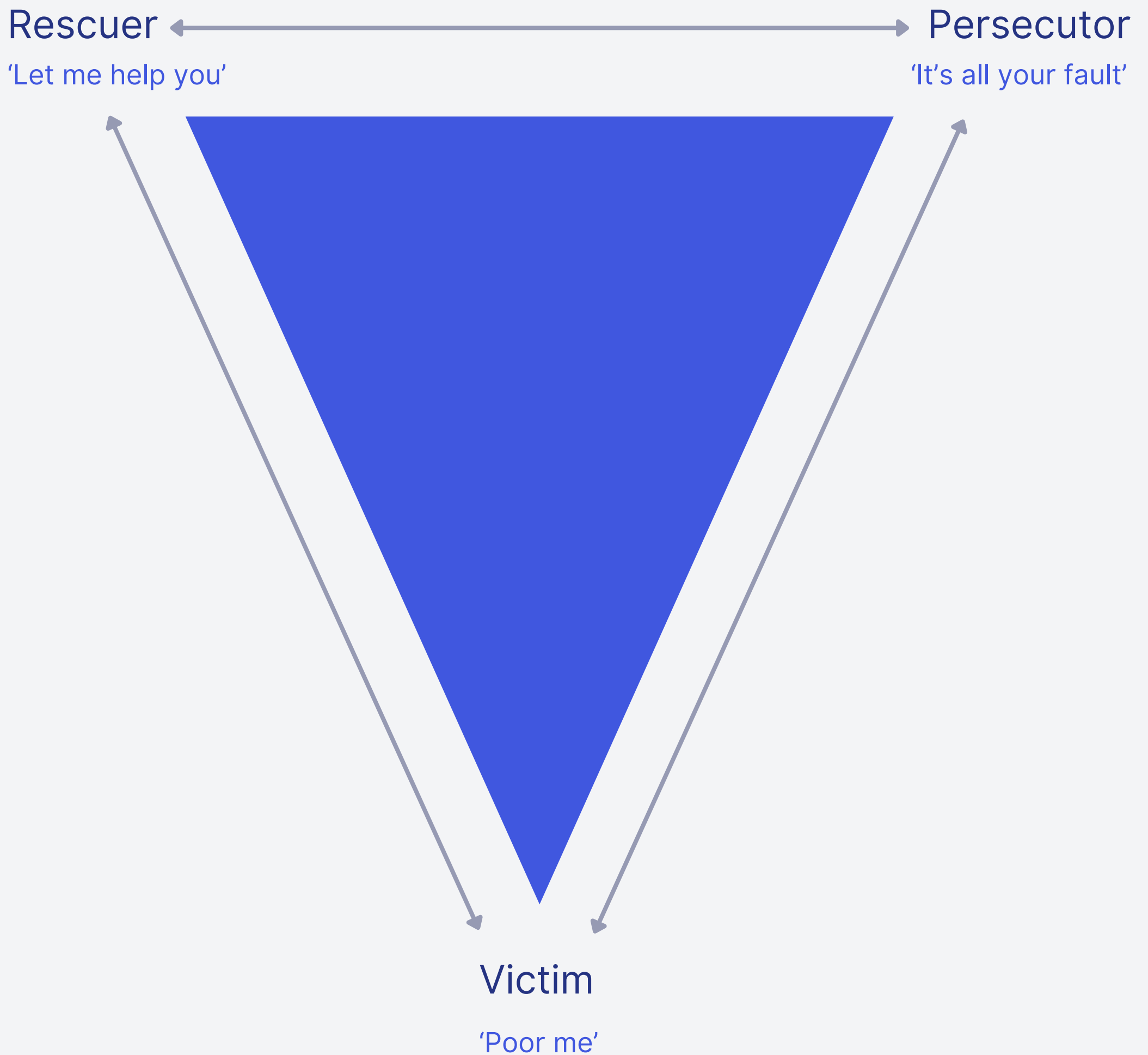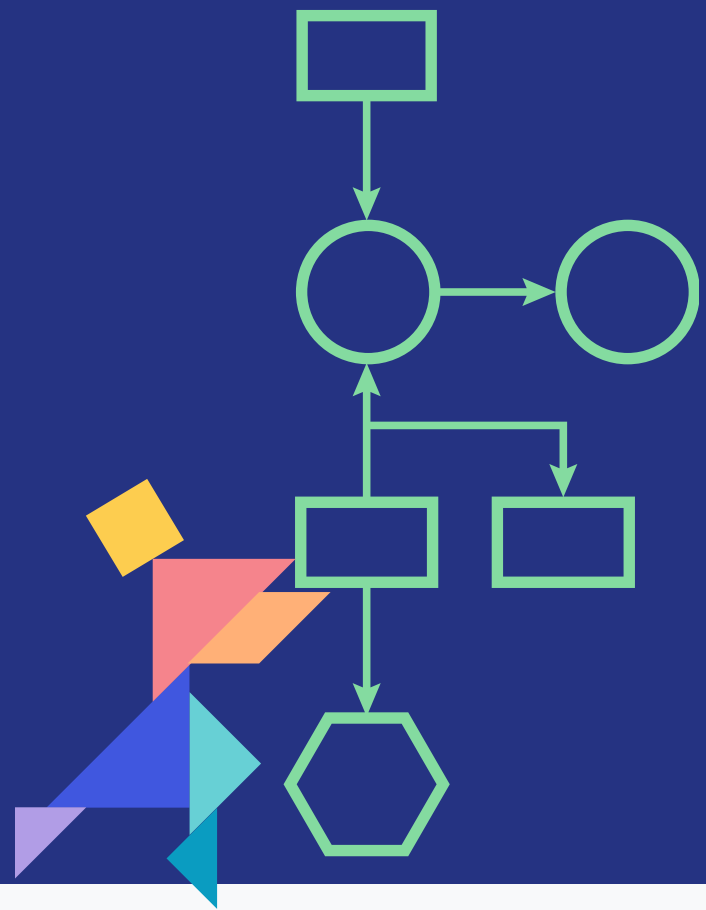
Kent Frazier

Co-Founder and CEO of ParadoxEdge

Drama triangle

Rescuer

'Let me help you'

Persecutor

'It's all your fault'

Victim

'Poor me'

05

A change framework for resource management transformation

A change management framework is a good idea for transformation projects, whatever their scale or complexity.

A change framework helps leaders consider the design and impact of change initiatives, anticipating and mitigating risk and resistance, and ensuring change programs are fit for purpose.

It also provides a structure to follow, meaning you can apply the same approach to future changes and don't need to reinvent the wheel each time. This is particularly helpful if you're rolling out new resource management processes incrementally by team or region.

We'll walk you through the general principles first, then provide an in-depth example of how this would apply to a common resource management transformation – centralizing resource management.

DEFINE the scope, vision and objectives	**ASSESS** the nature, size and scaleof the change and impacted stakeholders	**DESIGN** the change management approach to support effective delivery of outcomes	**IMPLEMENT** the Change Management Plan and review readiness	**TRANSITION** and embed the change into business as usual
Informs	Shapes	Supports	Delivers	Bau
Change Contex	Change Analysis	Change Planning	Change Delivery and Readiness	Change Reinforcement
DEFINE	**ASSESS**	**DESIGN**	**IMPLEMENT**	**TRANSITION AND SUPPORT**

Step 1 – Defining the change

This stage is concerned with defining the scope, vision, and objectives of the change initiative. It involves asking critical questions such as what the change entails, why it is necessary, and who will be impacted.

This is the time to start getting buy-in from senior leaders. Securing visible and active sponsorship from senior leadership is crucial to champion the transformation.

Questions to consider
- What is the nature of the change?
- Why is the change needed?
- What are the aims and strategic objectives?
- When will the change happen?

- How will the change happen?
- Who will sponsor the change?
- Who needs to be involved?
- Who is impacted?

Key actions for defining the change

Identify the reasons for the change and its strategic significance

Something has been the impetus for the change. Dig deeper to understand the full story. Is the aim to increase transparency into resourcing decisions? To ensure more strategic alignment between resource management and business goals? To streamline workflows? To cut costs or surface spare capacity? Talk to key stakeholders – from frontline colleagues to strategic leaders – to understand the pain points and problems in the current system.

Define the scope, vision, and objectives of the change initiative

Be ready to manage expectations around the change initiative. Think about what you will – and won't – be responsible for. Set a clear vision for what the outcome of the change initiative will be – solving the problems identified by stakeholders.

Determine the timeline and milestones for implementation

Begin to plan a schedule for the change program. Will you do everything at once or have a phased rollout? Consider the different stages you'll need to go through. For example, assessing, designing, implementing, scaling, etc. Don't forget to factor in time for training and supporting people in their 'new normal'.

Secure visible sponsorship and support from senior leadership

Engage senior managers to ensure top-down support for the initiative. Align the objectives of the project with overarching strategic goals around efficiency, growth, revenue, etc. Secure a named sponsor who'll be responsible for championing the change program – especially if the going gets tough.

Assess potential risks and barriers to change

Consider potential risks to your change program, so you can plan to mitigate them. For example, you may encounter resistance from departmental heads or frontline workers, hit technical limitations that curb your ambitions, or cultural barriers that need navigating.

Step 2 – Assessing the landscape

This next stage involves assessing the current state of resource management in your organization – so you can understand the nature, scale, and complexity of the proposed change.

It's also concerned with identifying key stakeholders, understanding the impact on them, and working out how to best manage their response to the change.

This step lays the foundation for designing an effective change management approach tailored to the organization's specific context and challenges.

Likely stakeholders

- Senior Management – Strategic oversight and alignment
- Team Leaders – Implementation of changes to existing workflows and support for team members
- Resources – End users impacted by changes in resource management processes
- Human Resources (HR) – Support for change management, employee engagement, and training
- IT Department – Technical support for system changes and data analysis
- Finance Department – Financial analysis and alignment with budgetary constraints
- Communications Team – Support for communicating the change effectively

Key actions for assessing the landscape

Evaluate the current state of resource management process/es due to change

Evaluate the current state of resource management practices and systems related to your change initiative. For example, resource allocation methods, software and systems, and communication processes. Work with the experts who perform the tasks on a daily basis to get an insight into how things really work – or don't – rather than relying on what it says on paper.

Identify stakeholders and understand needs and concerns

Change initiatives have a range of stakeholders. Senior leadership will want to know how the change initiative will drive key strategic objectives, such as increasing revenue or reducing costs. End users, on the other hand, will be more concerned with the impact on their day-to-day activities. Identify and understand stakeholders needs now, to inform your engagement strategy later.

Assess the readiness and capacity for change within the organization

Assess how ready your organization and people are for change. Consider factors such as organizational culture, past experiences with change, and the current workload. Is now the right time to start? Conduct a SWOT analysis to understand the current landscape – for example, a strength might be support from senior managers, but a weakness might be a lack of access to IT support. Do you need to overcome certain weaknesses before you can embark on the change project?

Step 3 – Designing the approach

This stage involves designing the change management approach to support successful outcome delivery.

With a thorough understanding of the change landscape, you can start to design a comprehensive change management plan.

This goes into much more detail than Step 1 and involves defining key activity streams, developing a communication plan, and establishing mechanisms for stakeholder engagement and feedback.

It's important to have a defined methodology as this makes the process repeatable – which is important if you're rolling out the change to different departments in phases.

Key actions for designing the approach

Key actions for designing the approach

Top-down is when leaders determine the nature of the change and how it's going to happen. Co-creation is when you work with stakeholders to find a solution together. Co-creation is often more challenging and time-consuming, but can lead to higher engagement and more innovative solutions. Consider which approach works for your initiative.

Define key workstreams, deliverables, and timelines

Work out what the project is actually going to entail and create dedicated workstreams. For example, if your change program is to centralize resource management, you may have a workstream for researching and implementing new software, another workstream for reviewing and standardizing processes, and so on. Define the deliverables and timeline for each workstream, as well as any dependencies.

Allocate resources and responsibilities for implementation

You're a resource management professional, so you know you'll need the right resources to complete this project on time and to schedule. Ensure that each workstream has the necessary resources and budget.

Create a stakeholder engagement plan

Develop a plan for engaging various stakeholders throughout the project, being mindful of their interest and influence levels. Include strategies for regular updates, feedback loops, and addressing concerns.

The stakeholder matrix

Put your identified stakeholders in a matrix according to their level of interest and power to influence others. This will help determine how you engage them.

High interest, high power – Engage closely
High interest, low power – Keep informed
Low interest, high power – Keep satisfied
Low interest, low power – Monitor

High

Power

Interest

High

| Keep satisfied | Engage closely |
| Monitor | Keep informed |
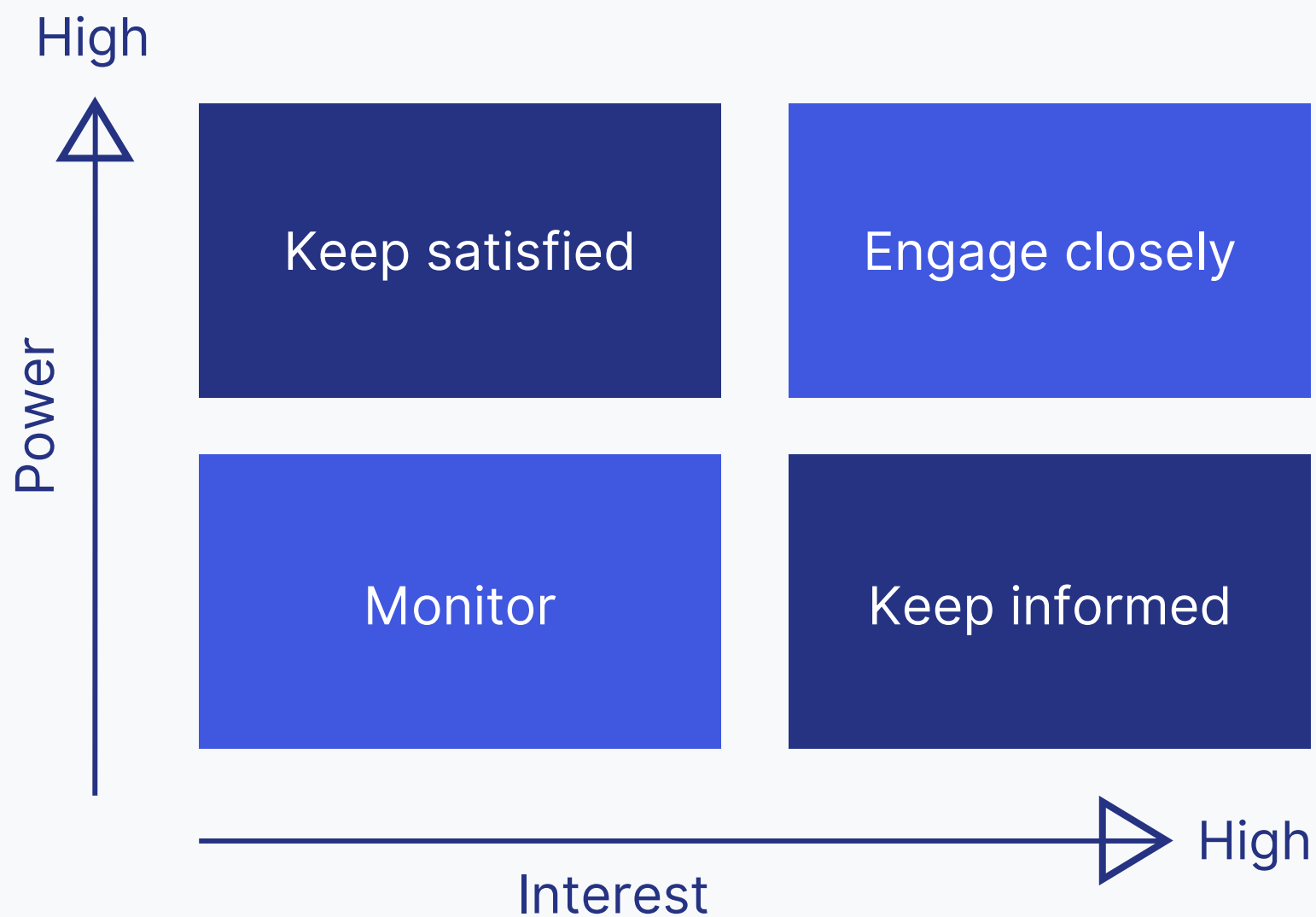
- **Engage closely** – Regular meetings, active involvement in decision-making, and tailored updates are crucial

- **Keep informed –** Regular updates and information-sharing sessions help ensure they are kept in the loop and feel valued
- **Keep satisfied** – Periodic updates and occasional involvement in key discussions will help maintain their satisfaction and support
- **Monitor** – Minimal engagement is needed, but they should be monitored to ensure no emerging issues or opportunities are missed

Create a communications plan

You may have an in-house comms team who can support with this. Consider your audiences, their preferred channels, the optimum cadence for updating people, and the actual messages you need to get across. Also think about who should convey information in person. For example, Prosci say that frontline staff prefer to hear from their supervisor if a change is going to impact them directly.

Sense check: What's the difference between an engagement plan and a communications plan?

A stakeholder engagement plan and a communications plan may sound similar, but they serve different purposes. Your engagement plan facilitates two-way conversation and feedback. Your communications plan is concerned with disseminating information only.

Develop training and support programs

Depending on the nature of your change initiative, people will need different levels of training and support. For a relatively minor change like introducing time tracking, you may simply be able to provide one or two training sessions and some 'how to' documentation. For a bigger change, like introducing new resource management software, you may need to deliver training and on-going technical support.

Identify success metrics and evaluation criteria

Determine how you will measure the success of the change initiative. Establish clear metrics and criteria for evaluation, such as adoption rates, performance improvements, and stakeholder satisfaction. You'll need to regularly assess progress against these metrics and make adjustments as needed to ensure the desired outcomes are achieved.

Step 4 – Implementing the change

Implementation involves executing the change management plan. This may be a phased approach that begins with a pilot program, or an organization-wide launch. As with any project, you'll be following your plan and monitoring progress, addressing any issues as they arise, and maintaining strong communication throughout.

Your sponsor should be visible and active throughout this process, providing positive reinforcement of the project objectives and vision. They should also be empathetic and supportive of colleagues who may experience natural resistance to or fear of change.

Key actions for implementing the change

Communicate the vision and rationale for change

You're about to launch the change project. Before you start, you need to communicate what's happening and why. Articulate the big picture and vision for the future. Ideally, you want to tell such a compelling story that people are eager to get involved. Make sure your sponsor is cheerleading at all levels.

Provide support and resources for employees adapting to change

Change is hard and resistance is to be expected. Provide support to people as they navigate the change. This could be anything from technical support with new resource management or time tracking tools, process support relating to new ways of doing things, or emotional support to overcome their opposition to change. Remember to make sure anyone responsible for supporting people through change – like line managers – get the extra support and information they need too.

Monitor progress and address issues as they arise

Monitor project progress and track your KPIs to ensure you're sticking to schedule and stakeholders are satisfied. Address any issues as they arise – particularly from high interest, high influence stakeholders. Remember that low interest stakeholders can move to high interest if the change begins to encroach on their work, so remain vigilant and mindful of their needs.

Celebrate milestones and achievements

Make sure your engagement and communication plans include acknowledgement for milestones and achievements. These are essential for maintaining morale and recognizing people's efforts to date. Recognize and reward individuals and teams for their contributions to change.

Step 5 – Moving forward

The final stage focuses on next steps. If you've taken a phased approach to implementation, this stage might involve assessing the success of your pilot before scaling the rollout. If your change initiative is now complete, this stage is about making sure new processes are firmly embedded.

You'll continue to support people for as long as they need. But as your changes become the 'new normal', the focus shifts from change management to sustainability and continuous improvement – iterating on the improvements you've made.

Key actions for transitioning the business

Evaluate against KPIs and gather lessons learned

Gather feedback from stakeholders and project team members to assess the success of your change initiative against your stated KPIs. Identify successes, challenges, and areas for improvement to refine your change management approach for future initiatives – particularly in a phased rollout.

Ensure new processes are fully embedded

Ensure that the new processes are fully embedded, for example, by adding new documentation to your intranet, developing new training programs, and including new processes in induction programs.

Provide ongoing support

Some changes need longer-term support than others. For example, implementing new resource management software may require on-going technical support for new user queries as they arise – this could be through documentation, phone or chatbot support, drop-in sessions, or a dedicated point person to answer questions in each team.

Encourage continuous improvement

Once new systems and processes are embedded, provide mechanisms for colleagues to provide ongoing feedback and improvements. Remember that change is a continual evolution to optimize operations over time.

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Key takeaways and next steps

Key takeaways

- A people-centric approach wins hearts and minds, increasing engagement
- Establishing a repeatable methodology helps you refine your process for future rollouts
- The change process will feel uncomfortable and meet resistance – but it'll be worth it
- People who perform process and tasks every day are the experts – listen to them

- Senior sponsorship is key to achieving a successful project outcome
- Support frontline workers but also the people supporting them
- Leverage ambassadors for peer-to-peer communication
- Engage and communicate to allay fears and win support

Next steps

Your next steps will be unique to your resource management challenges and change agenda. However, we'd love to talk if you're interested in:

- Centralizing resource management using a resource management platform
- Graduating from spreadsheets to something more secure, scalable, and sustainable
- Improving your resource management processes through automation and digital workflows

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