MARKETING’S ROLE in Change Management

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What do Disraeli and his observations have to do with the modern-day A/E/C industries? A lot. It’s safe to say that many of our firms will go through at least one fundamental shift in how we conduct business during the next year. Business analysts argue that businesses now face increased levels of dynamic change due to external market drivers, a desire for greater efficiency, growth, and advances in technology.

More than ever before, firms are seeing changes in processes, leadership roles, and new applications. And although we tend to look at changes in our firms with fear, anxiety, and hesitation, change isn’t all bad. Change is a sign of improvement to come, but it is an investment and must be managed to maximize the benefits and encourage adoption.

The Change Dilemma

As marketers, we are often catalysts for change, looking for the latest industry trends, technologies, and communication techniques to help put our firms ahead. But change can be difficult for engineers, architects, project managers, and other technical staff members we support. These technical (non-marketing or business development) staff members are expected to be highly utilized, leaving them with little time to focus on anything other than designing and constructing projects for clients. Change can also cause fear because of the unknown risks and consequences of stepping beyond the comfort of predictability.

Successful change requires understanding the people at your firm, addressing their fears, and engaging them in the right way with the right information. Simply put, mitigate the change dilemma by building a positive culture of change. But getting there can take considerable planning and effort.
Marketing’s Role in Change

So, how can marketing and business development professionals help to build a positive culture of change in our offices? We can drive change management processes. We have an opportunity to bring more value to our firms by supporting and managing change initiatives because we already have many of the skills and insights to support this. As marketers, we understand our people. We know how our technical professionals think.

Marketing makes the connection between business processes, technology, and business development strategy. Our job is to communicate technical concepts in a way that’s digestible for non-technical people. We apply these same skills by learning to communicate change in a way that is digestible and non-threatening to our staff. Here is a look at how Coffman Engineers and Fuss & O’Neill approached change.

Coffman Engineers, Inc.

Coffman Engineers has been going through a lot of change during the last several years. Our company has steadily grown in staffing numbers, geographic location, and disciplines offered. We recently had a new team transition into corporate leadership positions, filling roles the former leaders held for three decades. New company mission/vision statements were rolled out earlier this year to support our ongoing growth and new leadership. Our marketing group alone is in the process of rolling out new project databases, a company-wide CRM (for the first time), and a new intranet site.

This level of change has the potential to send our engineers running for the hills, yet it is all necessary for our needs as a company. Our marketing team embraced change management planning for recent projects to take the chance out of change by guiding people through the adoption process. For example, a key part to implementing a new CRM was identifying possible hurdles in the initial launch, training, and adoption, and then developing methods to mitigate them. This included a detailed communication plan that focused on the user understanding why and how it would benefit their workflow. Communication for major project milestones was also planned to be delivered in a combination of channels including in-person, email, intranet posts, and printed posters. The in-person messages were delivered by a variety of staff members, but they all contained consistent messaging.

Fuss & O’Neill

We caught up with Kathy Nanowski, CPSM, director of marketing at Fuss & O’Neill, a civil and environmental engineering firm, on how they used change management to thoughtfully roll out a new sales approach. We picked up on three key components of their successful change management execution: leadership involvement and endorsement, thoughtful training, and accountability. Their chief operating officer supported the new capture-planning sales approach, attended a three-day training with Nanowski, and was available for training support. Following the initial training, additional sessions were provided in person at nine office locations to ensure every employee received the same level of instruction. Monthly meetings were held to ensure accountability. Department leads reported on their capture planning and provided updates on action items. Most of their staff has embraced the changes and they are seeing the positive results of their investment in planning and training.

Plan for It

Change management will look differently for every firm, but the plan should at least contain these key components.

• Garner leadership support
• Anticipate and mitigate resistance
• Communicate the reason for the change (the why)
• Communicate the benefit to staff or company (what’s in it for them)
• Implement a thoughtful training plan

Not every company change needs a detailed change management plan.
However, a plan should be considered if the change affects people, their behaviors, or workflow. Changes are also significant investments in time and financial resources, so consider the positive return of better adoption. Here are guidelines we use in our change management planning at Coffman. After identifying the major planning activities, we integrate them into the project schedule.

Sponsorship and Planning (+ Resistance Management Plan)

Prior to starting, we fully engaged a corporate leader (or group of leaders) to sponsor the project. You will need their endorsement throughout the course of the project. In this section of the plan, articulate the business case (the why) and your goals for the change; identify how you will engage leadership and garner their sponsorship; define the behavioral changes that you want employees to start, stop, and continue; define your success criteria; and identify what resistance might look like, who will help manage it, and how you can prevent or mitigate before it impacts the project and organization.

Awareness (+ Communication Plan)

It is imperative to create a positive and proactive awareness campaign for staff to understand the why and to answer the question of “What’s in it for me?” In this section, identify how you will inspire new behaviors through communications, rollout, and training; plan communication tactics based on the project schedule; identify and organize champions; and identify feedback channels. Look for ways to maintain engagement, excitement, and open feedback throughout the entire project.

Learning

Develop the training schedule and how you will deliver it. Communications outlined in the previous section should also include how the training will be communicated to the user and training groups. Identify how you will gather feedback during and after to ensure there are no gaps in training and user expectations.

Readiness and Adoption

This section of the plan identifies how you will provide ongoing support; assess user satisfaction; and measure usage and adoption. Throughout rollout and training, collect feedback, monitor usage, and re-evaluate the success criteria. This support will continue after the rollout is complete and late adopters continue to go through the learning process. Ongoing support through open feedback will help to keep staff motivated.

While the suggested planning method discussed here isn’t the end-all to your biggest change hurdles, it will help your firm identify what needs to be done before you start to increase the likelihood of seeing adoption success. After guiding your firm through change management planning, you will begin to see trends in the successes and challenges that can help you build a positive change culture. We leave you with a parting thought from Disraeli that “The secret to success is constancy to purpose.” In other words, in an environment of constant change, set your sights on the big-picture vision at your firm, visualize where you want to be, and plan for that success.