Change Management Sponsor Training

Introduction

An essential element of successful agile change management is well informed, active and committed Executive Sponsors, willing to champion the change, removes barriers to progress and address inter-dependencies with other change initiatives.

Having delivered a significant number of sponsor training events, I have designed a Sponsor training course that addresses two areas of most interest to Executive Sponsors:

- Sponsoring an individual change initiative
- Supporting the culture and working environment for continuous change

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Course Summary

Sponsoring an individual change initiative:

The contents of this Sponsor training are based on four main areas of interest:

- Scope of the role
- Definition of transition activities
- Key activities for Sponsors
- Checklist of questions for those reporting to Sponsors

Scope of the role
Agree that the sponsor role covers both delivery and transition, tackling the assumption that sponsorship only relates to the creation of project deliverables.

Definition of transition activities
Identify the change management activities that form the transition from current to new ways of working, recognising that it is only when this transition has been achieved that the benefits promised in the Business Case can be realised.

Key activities for Sponsors
Explain what activities Sponsors should be championing during transition to ensure that benefits are realised. These activities are explained using a simple, intuitive lifecycle model.

Checklist of questions for those reporting to Sponsors
Explain what questions to ask and answer in establishing an effective working relationship with those managing the delivery of the change, and those leading the activities to achieve transition. These "contracting" conversations enable all parties to understand how much responsibility and authority they have for acting on their own initiative, and under what circumstances the Sponsor needs/wants to step in.

Supporting the culture and working environment for continuous change:

The contents of this Sponsor training explore two key areas for Executive Sponsors, based on the assumption that they have the hierarchical power to act at a strategic level for their organisation:

- Portfolio Management
- Balancing change with business as usual

Portfolio Management

Defining the questions that Sponsors need to ask those administering the portfolio of projects and change initiatives, to ensure they understand the context of individual changes, and the inter-dependencies and overlaps of the initiatives. This enables Sponsors to communicate vital contextual information to all those impacted by change, providing a holistic picture of the totality of change within business units.

Balancing change with business as usual
Designing the questions to ask to understand the totality of impact on the business, so that Sponsors can determine the level of risk to business as usual triggered by the volume of change taking place.

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For more details, click here for a suggested Sponsor Training course outline. This is tailorable to your needs and the type of change that your organisation is implementing.

Course outline
The following is a suggested outline of a one day training event for senior leaders undertaking the sponsorship/senior responsible owner role. This provides the basis for discussion for how this can be tailored to meet the needs of your senior leaders.

Objectives and introductions
Objectives
- Understand the contribution that Sponsors make to the effective delivery of change

- Review the full range of responsibilities that Sponsors have for managing individual change initiatives and creating an environment that supports continuous change.

- Understand the Sponsor activities required for each step of the lifecycle of change.

- Develop effective working relationships with those delivering and implementing change.

- Use Agile techniques to understand the impact of multiple, inter-dependent changes.

Introductions
What change are the participants sponsoring and how does that link to the changes others in the room are sponsoring?

Scope of the role
Explain that change is formed of delivery and adoption, and that these two elements are undertaken by project teams and subject matter experts from the business. The Sponsor role has to champion and guide these elements in tandem.

In addition, the Sponsor role is responsible for shepherding individual initiatives from initial idea to successful adoption, and for ensuring that the culture/environment of the organisation supports multiple, inter-dependent change initiatives.

Activity
Participants to devise their definition of sponsorship and the role of Sponsor/Senior Responsible Owner.
Share feedback from the participants, summarise the common themes, clarify assumptions they are making.

Sponsoring an individual initiative

Summarise the activities in project delivery and transition using the APM project lifecycle and the Kubler-Ross transition model as the basis of this discussion.

Demonstrate how transition is affected by the choice of project approach – waterfall and Agile.

Create a simplified lifecycle model of transition and provide examples of the change activities under each of the headings:

- Awareness
- Participation
- Adoption

Ensure participants understand how transition moves at different paces depending on the perspective of individuals (via the Rogers model), the level of change (via the competency model) and the volume of change (via the VUCA model).

Activity

Participants are asked to apply these points to changes they have been through and changes they are leading in the business now. Learning points include:

- Identification of the different perspectives they and their staff have to change and how this creates different levels of 'learning dip' and different shapes to the transition curve.
- Recognition that irrespective of the benefits of the change, individuals still react emotionally to change

Sponsoring through the lifecycle - creating awareness

Explain the motivational benefits of setting the scope and benefits of the change into the wider context of emergent change, and how this impacts the vision.

Review different motivational models for getting involved, with emphasis on the creation of intrinsic motivation and how setting change in the wider context develops the "purpose motive", one of the three elements of intrinsic motivation.

Explain the Beckhardt Change Formula and how this helps to define the content that generates the motivation for change and how the practical support for change can address the resisting factors of learning anxiety.

Activity

Participants will apply the Change Formula to their own examples of change.

Sponsoring through the lifecycle – generating participation

Review the wide range of activities needed to generate participation by those impacted by change, and explain the importance of providing choice in how staff participate in change, linking this choice to the elements of intrinsic motivation.

Look at the importance of senior leader behaviours in creating the environment for change:

- Scenarios
- Stories
- Role modelling

Sponsoring through the lifecycle – embedding adoption

Short session to identify the activities needed to embed change into the norms of the organisation, using the Trompenaars model of cultural change as a basis for discussion.

Also share the ideas from the Gartner consultancy on the importance of closing off access to old ways of working.

Getting the right people involved

Review the different objectives and responsibilities between the Sponsor, the Project Manager (delivery focus) and those adopting change within the business (business as usual).

Identify the problems when the levels of authority and the responsibilities for solving problems are not clear and discuss the importance of establishing trust between the roles. Summarise the findings from Covey on the cost of distrust, and examine the 2 key elements for developing trust:

- Relationship building – exchanging confidences, creating the feeling we have something in common and that we are part of the same tribe.
- Transactions – doing what you say you are going to do, repeatedly so that you create a sense of reliability.

Activity

Participants work together to identify the questions they need to ask and the statements they need to make in an effective contracting conversation.

Activity

Participants complete a Sponsor Questionnaire to help them identify when they are the right person to sponsor an initiative, and when the role would be better performed by others, including subordinates. This is a key point because many organisations have created a bottle neck because all change is sponsored at the most senior level, and there are too few executives to sponsor the high volume of change that organisations are commissioning.

Creating the environment for continuous change

Overview of the challenges of continuous, evolutionary change and the impact of agile approaches, which increase the volume and frequency of change experienced at every level of the business.

Examine the importance of balancing business as usual and transformational change, and the difficult choices that requires to create sufficient time and resources for change.

Activity

Participants to identify actions they can take to create the time and resources for change in their area of responsibility.

Horizon scanning

Explain the importance of horizon scanning in understanding the potential for further change and the best sources of information to be used in horizon scanning.

Activity

Participants to devise the questions to ask about the portfolio and the questions that form an effective horizon scanning process.

Understanding what questions to ask the PMO or other portfolio management function so that the Sponsor is clear about the scale of change taking place across the business, and the inter-dependencies between each of the initiatives, and the potential for duplication of effort and overlapping scope.

Impact mapping

Introduce the concept of impact mapping to assess how much change is taking place in the business at any one time, and how likely this is to destabilise business as usual.

Activity
Participants to design the questions, their frequency and those to involve in assessing the portfolio of change initiatives and mapping their impact onto each of the business units.

Next steps
An opportunity for participants to review the key points for the training and take decisions on how this will impact their sponsorship of change initiatives.
Participants are asked to share their insights and their decisions on next steps.

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