

Using data to make a compelling case for change management

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Introduction

In this session, we reviewed the importance of data in change management emphasising its critical role in establishing the value of our work, and how it engages those stakeholders who remain unconvinced by emotional engagement via storytelling.

The discussions highlighted various challenges faced by organisations in implementing effective change management practices, as well as the importance of leveraging technology and data analytics. By exploring these themes, this summary aims to provide a comprehensive overview of current trends and best practices in the field.

We went on to share some of the data points being collected in the annual global [Capability for Change survey](#), and identifying how we can use different groups of statistics to argue for:

- Greater senior management engagement in change
- Better management of the change portfolio
- Importance of providing support and building the capability for change in those affected by change

The [2024 survey is open](#) and people are invited to participate.

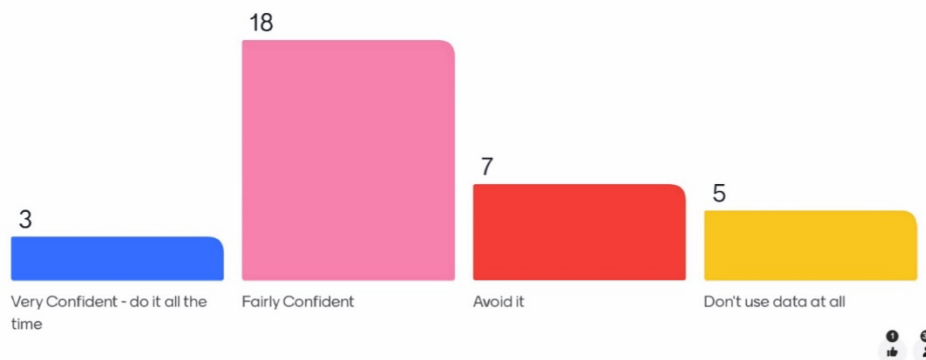
Content

1. Using a survey tool to assess participants current views

The discussions began with an examination of insights derived from a recent survey, which underscored the necessity of utilising data to inform decisions, measure success, align expectations and prove the value of change management projects.

Participants engaged in a live polling activity to gauge their confidence in employing data effectively. The results revealed a significant number of participants who either avoided data use or expressed uncertainty about how to integrate it into their change management efforts. This highlights a prevalent gap in understanding and application that organisations must address.

What is your confidence level about using data in change management ?



2. Importance of Data

The presenter articulated the importance of data as a cornerstone for informed decision-making in change management. Data is essential not only for aligning leadership with organisational goals but also for measuring the success of change initiatives. Various types of data were identified, including metrics on participation rates in change programs, the achievement of defined change goals, and employee perceptions of the change process. This multifaceted approach to data collection allows organisations to gain a holistic view of their change management efforts. The presenter suggested that measures could be divided into three groups.

- **Participation**
 - levels of engagement with those impacted by the change
 - Perception of how much change is happening
- **Achievement**
 - Project delivery
 - Benefits realisation
 - Capability builds
 - Adoption of new ways of working
- **Perception**
 - stakeholder view
 - Alignment with vision
 - Resilience

3. Challenges in Data Collection

Despite the clear benefits of data-driven decision-making, several challenges were highlighted. Participants discussed difficulties in identifying relevant data points, maintaining engagement in surveys, and proving the return on investment (ROI) of change management initiatives. The phenomenon of survey fatigue emerged as a significant concern, prompting suggestions for alternative engagement methods, such as interactive discussions during workshops to foster a more participatory atmosphere.

4. Measuring Change Management Effectiveness

Effective measurement of change management initiatives is critical for long-term success. Key metrics discussed included tracking the number of presentations, communications, and training sessions conducted, as well as monitoring changes in employee sentiment towards new systems. The complexity of stopping old behaviours, which can be more challenging than initiating new practices, was emphasised. Participants stressed the need for diverse metrics, as different leaders prioritise varying data points, such as learning outcomes, participation rates, and overall change results. Clear communication of these metrics is vital to ensure that all stakeholders understand and buy into the change process.

5. Trends in Project Management

The discussion shifted to the role of dashboards in project management, comparing them to car dashboards that provide real-time metrics. Although the use of dashboards has declined in popularity post-COVID, there is a renewed call to reintegrate them into change management practices. This would enable leadership teams to effectively monitor project progress and facilitate timely adjustments as needed. The results from a global change management survey indicated several concerning trends, such as a lack of shared responsibility for change initiatives, time constraints hindering adoption, and the need for better-defined skills within change management roles.

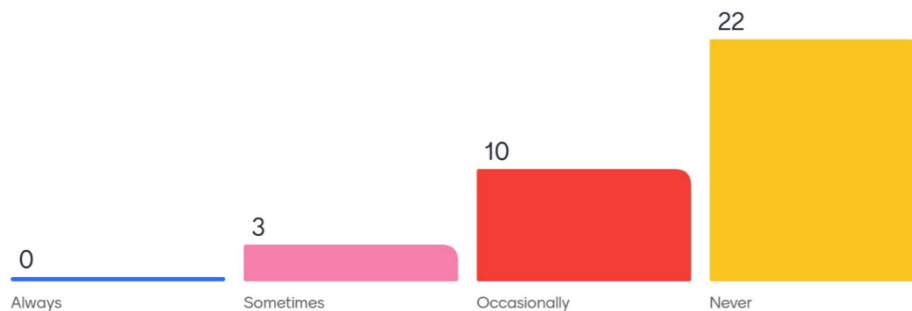
Some thoughts from the Capability for Change Survey 2023.

Responsibility for change is shared between staff and managers	48%
People have time to adopt new ways of working	42%
Skills for change management are known and respected	46%
We have sufficient people to manage the volume of change	32%
People always know change is coming	45%
Our level of change is manageable	42%
Senior leaders know how to sponsor change	38%
People openly talk about the pressures of change	66%

6. Collecting and Analysing Data

Practical methods for collecting data were a focal point of the conversation. Participants shared examples such as tracking system usage through IT departments and conducting pulse surveys at various stages of project implementation to measure user feedback. The importance of one-on-one meetings to gain deeper insights into user experiences was highlighted, with the understanding that these interactions often reveal underlying misconceptions and barriers to engagement. The flexibility to adjust strategies based on real-time data was underscored as essential for navigating the complexities of change management. Our own pulse survey said:

As part of your change plan, do you create a Data Analytics strategy?



7. Engaging Teams and AI Utilisation

The variability of engagement levels across different teams was a recurring theme, with some teams actively measuring the impact of changes while others struggled due to time constraints or a lack of focus on data collection.

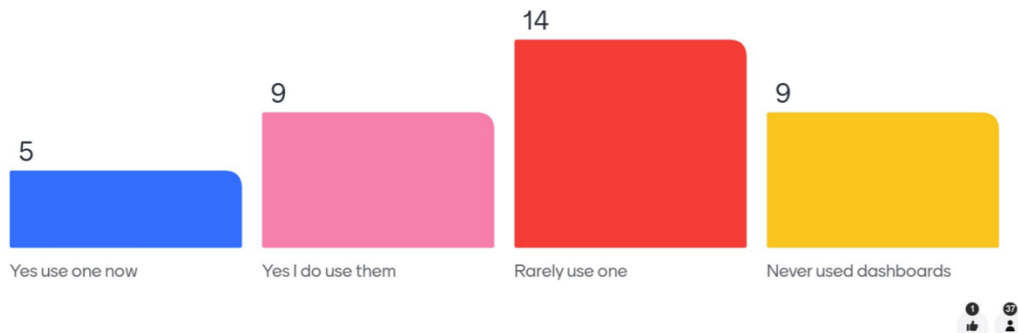
We discussed the value of team leaders working with change professionals to identify the metrics to be tracked, to ensure ownership and to enable a “like for like” comparison across all teams. Without this, it is harder to roll the data up to give a broader picture to senior leaders.

Participants reflected on the necessity of incorporating both qualitative and quantitative data to evaluate the effectiveness of change initiatives and establish long-term key performance indicators (KPIs). The use of AI tools, such as ChatGPT and Copilot, was noted as a promising avenue for analysing transcripts and identifying common themes, thus streamlining data collection processes and making analytics more accessible for non-experts.

8. Timing and Methods for Surveys

The timing of surveys was discussed in detail, with participants agreeing that surveys administered during or immediately after sessions yield the highest response rates. However, follow-up surveys conducted four weeks later can help assess whether initial responses reflect actual engagement or readiness for change. Additionally, the establishment of super user support groups was recommended to enhance engagement and drive the adoption of new practices. The value of peer sharing and group discussions was also emphasised, providing participants with opportunities to learn from one another's experiences.

Do you create a dashboard of key measures to track involvement and adoption of your change



Conclusions

The discussions emphasise that effective change management requires a robust, data-driven approach, innovative engagement strategies, and a commitment to adapt to evolving practices. Organisations must prioritise the integration of technology and the active involvement of all stakeholders to successfully measure success and foster a culture of continuous improvement.

As change management evolves, embracing new methodologies, tools, and collaborative practices will be vital for navigating the complexities of organisational change and ensuring that initiatives achieve their desired outcomes. By fostering an environment of open communication and feedback, organisations can enhance their change management efforts and better support their teams through periods of transition.

Finally, we asked people

What was the two things you will take away from today's session and do

29 responses



what they would take away from the discussion

Next steps

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