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## **A Quick Reference for Preparing a Change Management Plan**

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Change Management is an inherent element to any quality, productivity or improvement project, and represents modifications to the “way of living” inside a company; as a consequence, it needs to be handled in a strategic manner. During my experience as consultant and key user of many diverse kinds of projects, I have found that there are many useful materials for assisting us in understanding this key responsibility. Nevertheless, most of the time we need to spend a quantity of time and resources to understand and combine this concept with project planning and implementation.

The context of this article is to provide a quick reference to give people a starting point and/or time to analyze and start thinking about changing their organization, in conjunction with any productivity or business improvement project.

The steps are mentioned with a brief comment for reference. It is important that each of the following points is completely covered before starting with the following:

### **1. Keep it simple.**

We need to be conscious that productivity means to do the best with the least quantity of resources and effort, following the baselines and policies that the company has. And need to start with our own responsibility.

### **2. Understand the concept of Change Management.**

We will define it as a task for “putting order in a chaotic situation, with a strategic scope”; taking into consideration both internal and external elements. Knowledge of General System Theory, business, finances, productivity tools, as well as interpersonal / analytical skills and management perspective. As you can see, is not an easy job.

### **3. Understand and believe what the company wants.**

Ensure that there aren't any wrong corporate, organizational culture, mission or vision objectives. Any human group has their own way of living. This should exist even when it is not the ideal for some people. Any organization should have a road to follow and canalize their efforts. We need to discover what is our path. This comes from top management and our first question should be: where we are and where we want to go?

On the other hand, we need really to trust and believe in what we will be defending, and this is the first filter of the plan. If you disagree with the policies, goals, objectives, etc. of your organization, you need first to discuss it with your management and/or look for another activity. You can not "push against the flow".

### **4. Decide which strategy to use.**

There are plenty of strategies in Change Management that come from the “normative/educative” strategies based on mutual commitment based on values and cultural norms, until the “Coercive” strategies based on authority power and “imposition of sanctions”. The strategy to follow depends on what you found in point number 3.

## **5. To have support from top management.**

This is a vital point and the bottleneck of the Change Management Process. If we do not have this point covered, the percentage of failure in our program is high and the activity can become as unprofitable assignment of resources.

## **6. Document and formalize the CM Plan.**

This plan should include a training in technical and process, as well as communications program toward all the organization. Should start with the diagnostic and finish with a report at the end of project with recommendations for continuing with the change management cycle. An important part of the plan is to choose and define roles for the team that will be assisting you in the tasks, putting emphasis in choosing personnel really committed and results oriented.

## **7. Include activities in the project general Gantt Chart.**

This responsibility should have strong support in all levels of the project organization chart; therefore, be followed in the same way that the technical tasks are tracked in the Project.

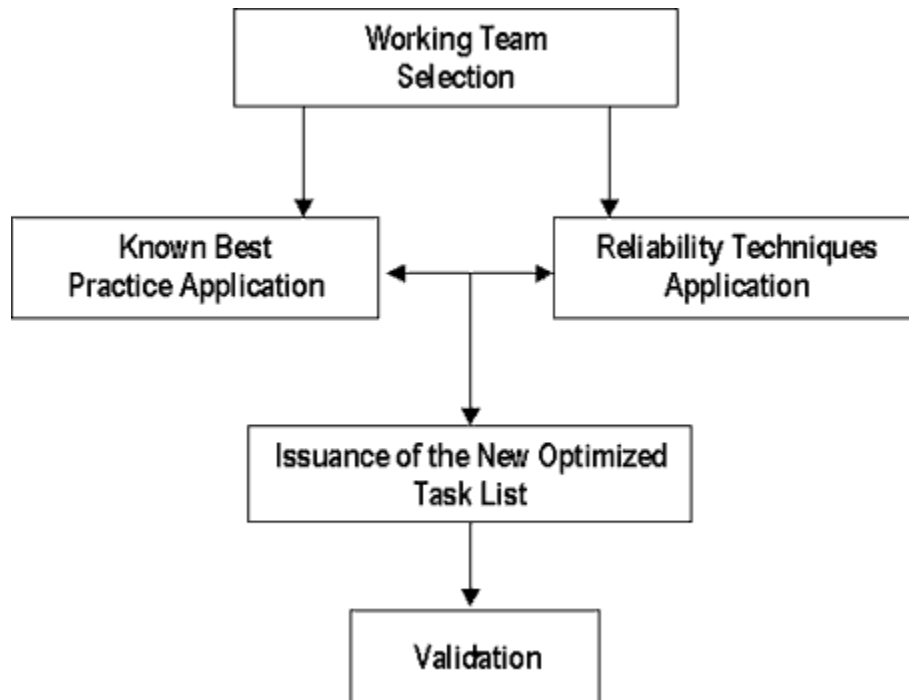
## **8. Check, act and start again.**

A series of activities will be derived from the plan, and need to be followed and accomplished 100 per cent. Changes can be required during project progress. High management reports should include Change Reports. These include reevaluation and redefinition of specific activities.

At the end of any stage of the project, and even after project implementation, this needs to be evaluated and decide if a new stage of Change Management plan is needed.

Change Management is not a process that is done once only, and it needs to have a global view of the company desired road. It is as dynamic as your organization is; therefore continuous review should be made and after all steps you should start again with point number one.

As a visual aid, the following diagram shows the concepts included above:



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