

# An Apt Point Of View



***"There is no power for change greater than a community discovering what it cares about."***

Margaret Wheatley

Unlike Marketing, or even Business Management, it is difficult to establish an historical context for Change Management. The very essence of business is change; the introduction or decline of products, services, markets, clients, providers, packaging, tools- even the "command and control" methods of Taylorism reflect an effort to manage change. Why, then, are so many books, toolkits, corporate departments and consultants buzzing about Change Management?

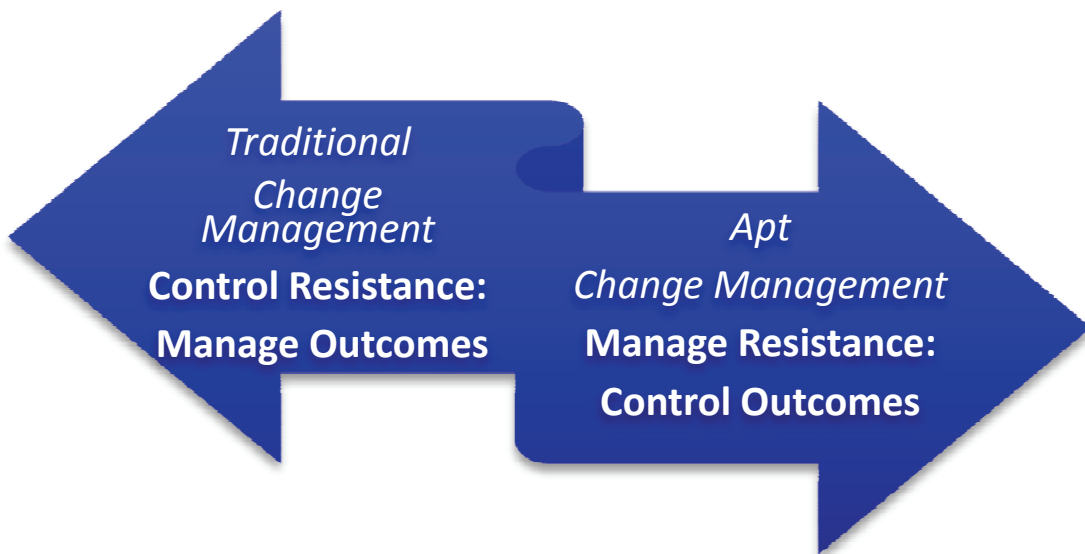
In the last breath of the 20<sup>th</sup> century, the opportunity to leverage technology to recast, (and in many cases, re-invent), business on a massive scale introduced a new source of change to the business of business. The resultant 'natural and inevitable organizational chaos' (Wheatley) spawned a new generation of models, processes, tools and theories ranging from the simplicity of Beckhard's Change Equation (1987) and Kotter's Change Phases (1990) to the complexity of Kruger's Iceberg , Burke & Letwin's Causal Model (1992) and Ajzen's TPB (Theory of Planned Behavior 1991).

While many of these tools, processes, models and theories are useful, at **Apt**, we believe that ***change management***, whether spawned by technology, business velocity, leadership or market forces, **is fundamentally rooted in the control of outcomes**. Successful change management is focused on, and rooted in, what can be controlled.

Perhaps the best argument against a committed Change Management program is the plethora of failed efforts. Limited take-up, work-arounds, retro-fit expenditures, business disruption and culture shift are among the downfalls of a poorly executed change journey. Failure is commonly attributed to lack of executive sponsorship, failure to measure, disjointed efforts and generic “resistance”, be it staff or management.

At **Apt**, we believe that, more often than not, the root of failed change management rests in a belief that reaction (and the associated level of resistance) can be controlled. The reality is that all change does cause disruption for the people impacted. The key to effective change navigation is not to “sell” the solution or to “communicate away” the disruption, but to anticipate the impact of the disruption, to predict and plan for the resistance and to introduce, support and pace the change to ensure predictable and desired business outcomes. In simple terms, ***we believe Change Management is less about controlling how people feel about the change, and more about controlling what they do with it.***

With over 20 years of experience with mergers, acquisitions, downsizing, outsourcing, systems upgrades and implementation, re-organization, business transformation and re-structuring, we’ve learned one simple lesson about change management: the business change itself is only one of many factors influencing the way people react, and many times resist, the business change.



Value Based Management (VBM) requires companies to **create value** (through a strategy), **manage for value** (defining governance, change management, organization culture, communication and leadership) and to **measure value** (valuation). In essence, VBM requires alignment of organizational and unit based operating systems to **achieve defined value**.

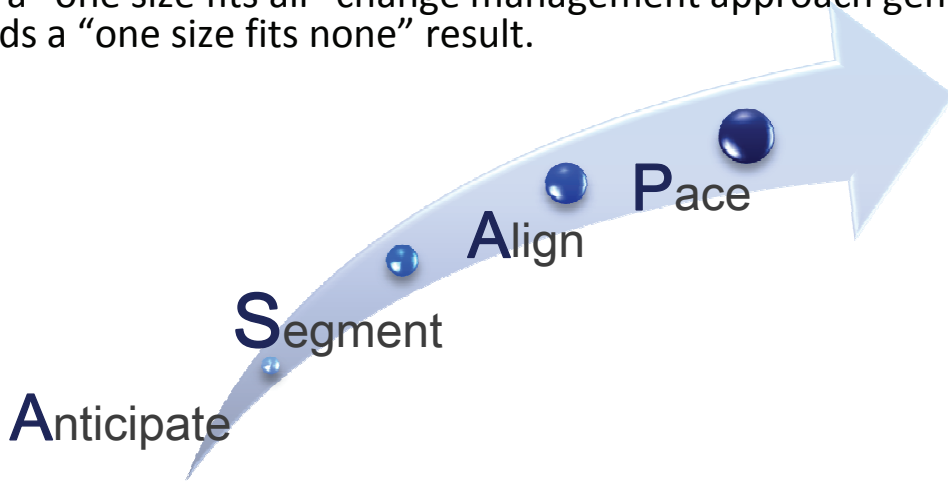
The **Apt** approach to change navigation is rooted in the principles and processes of VBM. There are too many factors at play to control the way people will react, or become 'resistant' to change (kids, house-hunting, health, financial gain, power struggles, and more all contribute to resistance). You can however, **anticipate, segment, align and pace** your change to drive behavior to **meet business outcomes**.



# The Apt ASAP Model

**Anticipate:** Companies that devote time to assessment of current dis-satisfiers, the relevance and opportunity of the change to address these dis-satisfiers and the velocity of current and anticipated business cycles, are best positioned to anticipate, plan for, and mitigate against disruption.

**Segment:** While the whole team may be “in this together”, there are a variety of roles to be played. Successful change management encompasses identification and tailored address of constituents. Unifying themes and central messages are relevant, but a “one size fits all” change management approach generally yields a “one size fits none” result.



**Align:** Engineers are not awarded bonuses for the patents they don't file, and recruiters don't get promoted on the number of candidates resigned --- but we often reward the manager who fails to release his team for training with a swat team to keep his unit running. A careful review of all aspects of the operation, and alignment in support of desired behaviors, is a critical step in enabling desired business outcomes.

**Pace:** Our experience shows us that velocity is the most critical factor in enabling change to yield desired outcomes. Successful change agents tune the pace of change to balance disruption and business velocity to meet desired outcomes.

## Manage Resistance: Control Outcomes

**Outcomes:** *Define desired outcomes and their business value*

### Anticipate:

- *Behaviors required to achieve desired outcomes*
- *Readiness for change*
- *Resistance factors and potential obstacles*
- *Environmental and/or competing events*

### Segment:

- *Plan distinct, tailored change programs for each constituent segment: Announce, Educate, Enable, Reinforce*
- *Create Change Webs: networks linked by common segment, behavior and outcome to manage resistance*

### Align:

- *Business, operational and employee lifecycle activity to support and enable desired outcomes by segment, behavior and outcome*

### Pace:

- *All change efforts to meet desired outcomes, by segment*

At **Apt**, we believe the Pettigrew and Whipp *Dimensions of Change (1991)*, comprising Content, Process and Context, are dated by the exclusion of **velocity**. We agree that companies must focus on the continuous interplay of these factors to effectively steward strategic change, yet our approach is rooted in the reality of today's business environment, and encompasses the **pace** of change.

# Key Bios

**Professional Services Firm** – Developed and implemented change management methodology, including documentation of tools, methods, and training materials for delivery consultants. Facilitated training of change management resources. Delivered change management services to Top Tier and Middle Market clients across the US and abroad.

**Manufacturing Client of Professional Services Firm** – Managed large scale transition to enterprise resource planning solution. From executive suite through multiple business units, employee groups and vendor relations; trained change agents in process to manage change and create/implement appropriate transition management plans (implementation and communications plans).

**Professional Services Firm** - As a member of a global team, re-defined the core service offerings and workforce model to open new markets. Lead the design and introduction of variable compensation and the implementation of the firm's global re-structuring. Crafted core messages, communications and re-designed systems, processes and tools.

**Retail Chain-** Managed transition of all employee support processes (benefits, payroll, performance, ons/offers) to enable public company acquisition of privately held 150 store retail goods chain. Designed process solutions and conducted all employee and support training.

**Financial Services Client of Professional Services Firm** – Created value proposition and coached executive leaders to manage large scale global transition of travel services division of business. Crafted and implemented transitional management plan to support long term objectives of business change. Worked side by side with IT and Process consulting teams to ensure clarity of change and to leverage knowledge of implementation plans.

**Money Center Financial Service Institution** - Working with the executive suite, planned and implemented 6 large scale acquisitions and mergers for the Operations and Technology Divisions of this large money center bank over 7 years, including a hostile take-over entailing a 45% reduction in force. Full lifecycle transformation from due diligence and leadership selection, process and job re-design through to communication, outplacement, facility close and remediation.

**Retail & Manufacturing Firm** - Designed and implemented hiring, training, reward and promotion processes to enable commission based compensation for unionized personnel. This fundamental step in support of an MBO yielded the additional benefit of a 75% reduction in employee grievances.

**Technology Outsourcing Provider-** Designed and implemented a compensation model to align to the core business model, providing a competitive advantage. Re-structured all employee lifecycle processes and chaired the design, development and implementation of core systems including PeopleSoft 8.9 Human Resources, proprietary immigration processing and Remedy-based call center application. Designed and implemented a global talent strategy; re-structuring work and processes across globally distributed teams and introducing new services in support of the company's 50% year-over-year growth.



# Stephanie Halliday Kelly

## *Managing Partner*

Stephanie lends over 20 years of corporate Human Resources and Change Management leadership to her projects. As VP, Human Resources at Cognizant Technology Solutions, she led North America Human Resources and Global Immigration Services while defining the company's global talent strategy and leadership development program. At Accenture, Stephanie grew through successive roles, including Associate Partner leading People Programs, Global Compensation and Technology Human Resources.

Focused on transformation, Stephanie applies a belief in aligning action to business objectives through all stages of the employee lifecycle; building organization design, selection, team composition, communications, development, assessment and rewards to meet desired results. A graduate of Skidmore College, Stephanie has built her knowledge across specialties, but has a particular interest in re-structuring , which began during her merger and acquisitions experience at The Bank of New York.

Known for her outspoken, innovative and intelligent style, Stephanie's expertise in leadership development, corporate talent strategy, change management and compensation makes her a trusted c-suite advisor. With a career spanning 3 continents, 6 mergers and over 10 acquisitions, she has consistently focused at the forefront of marketplace change, from consolidation to globalization, outsourcing to off-shoring.



## Ellen A. Lopresti

*Managing Partner*

Ellen has successfully partnered with business leaders across a diverse industry set, including financial services, manufacturing, professional services, and consumer products, for more than 15 years. Her blend of both internal and external consulting experiences are supported by an MS degree in Organizational Psychology, and enhanced by “Big 5” as well as “start-up” credentials.

As a delivery focused consultant and then an internal corporate Human Resources Director, Ellen designed and implemented new employee lifecycle processes, driving major change. Her skills and experience in the professional services environment; developing methods, facilitating change management workshops and creating and implementing effective transition management plans, support her recognition as an expert in Change Management. A champion of value based management, Ellen aligns business objectives, “hard skill” content, communication techniques and team dynamics to enable results.

Ellen’s exuberant and personable style make her an effective counselor and a keen navigator of cultural climate; effectively collaborating with business executives across a region or across a globe. Ellen’s passion is performance management process design, where she can apply her convictions to craft processes that stem from business strategy, reflect operational priorities, and are validated by diverse measures. With skills in negotiation, communication, transition planning and change management, Ellen is focused on successful deployment of the “total solution”.



## Vidya Murali

*Managing Partner*

Vidya applies a masters degree in HR and over 13 years of intensive experience across the spectrum of HR activities. She has been part of the HR leadership team in large multi-national IT Organizations, including Cognizant Technology Solutions, where she led Professional Development. Vidya's unique combination of in-house corporate and external consultative experience has demonstrated value on projects ranging from focused skill development to end-to-end talent strategies.

Vidya's work in group dynamics and team effectiveness, during her corporate and consulting career, equips her with a keen understanding of the factors influencing team formation, group dynamics and team identity. She successfully applies experiential techniques in her design and facilitation of major change initiatives, and has facilitated more than 30 distinct programs in support of both IT and non-IT Organizations. Vidya works with clients to blend experiential techniques, recognized assessments such as Belbin's team roles and MBTI, and custom models to drive desired behavior and enable effective team dynamics.

Vidya possesses core expertise in learning processes and performance criteria, and is recognized for her mastery of executive assessment; her custom corporate centers are unparalleled. With a career focused at the heart of the explosive India professional services market, Vidya naturally has a particular interest in cross-cultural management processes and organizational design for business growth.

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