

**Western Banker Magazine: HR & Training Digest**

Issue #21 – August 2013

**Managing Change***By Scott E. Byorum, Nationwide Real Estate Tax Service, Inc.*

*“Well, I’ve been afraid of changing, ‘cause I’ve built my life around you. But time makes you bolder, children get older; I’m getting older too.” ~ Landslide by **Fleetwood Mac***

In addition to understanding the basic mechanisms in adapting to change, there are certain methods to guiding transitions that are more successful than others. Having a defined and tested process when dealing with or implementing organizational shifts will increase the success rate of those efforts and provide the feedback needed for assessment.

The well-versed leader, now understanding the **Principles of Change** and having now identified the **Myths & Facts about Change**, is better equipped to seek out areas of needed improvement and allocate the appropriate resources to transform them into successful endeavors.

Before you start throwing around mission statements and getting people on board, gather your key team members from all operations and create a “Change Rail,” with each active force being a metaphorical “Train,” pulling the others along:

***Environmental Train:*** This is the greater outside muck that we swim in that may not always affect us directly on a daily basis but we slosh around in its tides: social climate, economic indicators, political fluctuations, governmental policy, regional demographics, legal statutes and even the natural environment.

***Industry Train:*** This encompasses the nature of demand of a service or product as required by the customer including quality, delivery method, endurance, customer service, innovation, etc.

***Business Train:*** In addition to the actual equipment and overhead to meet industry requirements, necessities include strategic placement and re-thinking in order to succeed, which falls into goals, pricing, branding, servicing, etc.

***Organizational Train:*** Dictates what must be altered in an organization’s structure, systems, policies, processes, resources, technology, skill base and/or staffing in order to successfully drive the business.

***Culture Train:*** The culture of a company uniquely relates to the collaborative norms embraced by the employees and leaders that support the organizational goals and ultimate business strategy.

***Behavior Train:*** Collective behavior creates and expresses an organization’s culture. Leaders and employees must choose to behave differently in order to change the organization’s culture.

***Mindset Train:*** This is a set of assumptions, methods or notations held by one or more people or groups of people that is so established that it creates a powerful incentive within these people or groups to continue to adopt or accept prior behaviors, choices or tools.

Describe the prevailing factors, issues, policies, people, and atmosphere in each section of the Change Rail. Clearly separate but identify what are facts and what are assumptions. Question and answer how the complexities of each Train are influencing the affecting one behind it, such as:

Example: *“How are each of the Environmental factors affecting our clients and the demand for our products and services in the industry; how are these stressors impacting industry factors to meet customer demands; etc, etc.”* The more in-depth and specific you explore the relationship between the push and pull of the Train, the more insight and knowledge you will gain to enable you and your team to manage change successfully.

And to test your accuracy and thoroughness about certain ideas or initiatives, back up the Change Rail: *“If we reverse this mindset, what will that do to these behaviors, and will it affect our culture...”*

By the time you have explored the key factors and issues in your Chain Rail you will be better able to:

- Define your story and build your case for change
- Determine the full scope of the change effort
- Identify specific change initiatives underway or needed
- Define the rationale and motivation, the vision, for the change
- Identify the specific target groups that must make the change happen
- Determine the degree of urgency
- Shape your initial communication messages
- Build training plans for the skills, knowledge and attitudes needed for the change to succeed

An exercise like this allows you to see the big picture, how the interconnected variations push and pull at the whole. You discover what should be measured and tampered with and what should be left alone. It doesn't just give you a lot of information (which it does) it also gives you the right information. As long as you are implementing effective strategies, measuring and reinforcing what works, like a grand conductor you can tweak the Train to successful destinations.

*Scott Byorum is the director of business development at Nationwide Real Estate Tax Service, Inc., an author and a certified Instructional Designer. He can be reached at 800-528-7803 or [scott@nationwidecompliance.com](mailto:scott@nationwidecompliance.com).*