UNL🔾CK CHANGE LTD

<div align="center">

P E O P L E - THE CENTRE OF TRANSFORMATION

</div>

To help answer all the People questions that emerged from our Sqwyz Transformation Community Network event, I have provided a Case Study on the successful implementation of a Smarter Working Programme. It involved moving over 5000 staff for Somerset County Council into a new build and provided them with smart enabled technology, to work remotely from any location. Hopefully, this brings it to life, to include 'Smart Office the Movie'. It does not cover the full Technology aspect (with the evolution of technology change since completing this in 2016), Security, Budget, or detailed Property impacts, as these would be separate Case Studies.

HOW PEOPLE FIRST REACT

- For it to be successful, I put people at the core. I have learnt that significant culture shift only comes from looking at the 'whole'. Early engagement and involvement of staff was the biggest success factor. Some people will need more convincing than others. It is all about selling the benefits and understanding that people do not always want to change, due to fear of the unknown. I noticed a pattern of behaviour; - lots of questions before the move, negative comments such as; *"I cannot manage my team and trust them to deliver if I cannot see them".* When staff move to the new ways of working and it is implemented, suddenly it becomes quieter, as they learn to accept the 'new norm'. That is what happens when you know it has been successful! Think of the Kubler Ross, Change Curve (see below). The initial Kubler-Ross theory of grief was a description of major events in life. It was a reflection of the death of a loved one or the diagnosis of a terminal illness. After her initial publication she expanded it to include other major life events that can happen to people.
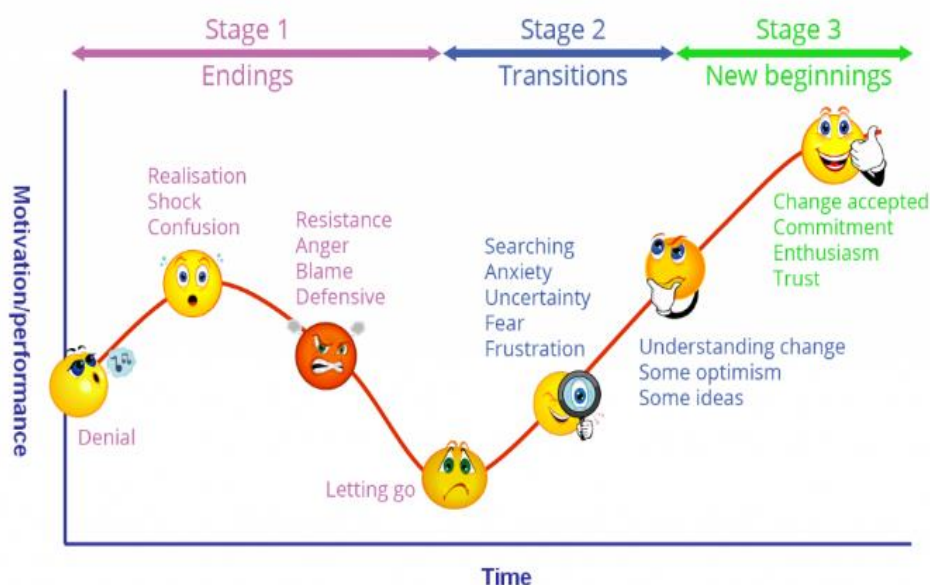
Elisabeth Kubler-Ross (Swiss American Doctor & Psychiatrist) Change Curve 1969

DRIVERS FOR CHANGE

- **Benefits were identified and articulated.**
  - Better utilisation of space - Apply desk ratios i.e.; Every 5 desks accommodated 10 people, on basis that some staff will be working from home, others on leave, sick or out at meetings.
  - Savings – This programme saw 35 buildings reduce to 5, substantially reducing costs on leases, running/maintenance costs.

- o Savings - Revenue and Maintenance by consolidating printing and stationery etc.
- o Savings – Reduced Travel Costs.
- o More mobile workforce able to respond to the changing organisation.
- o Improved office environment.
- o Reduction in paper storage – no more than 1metre per person.
- o Improved work/life balance for staff with ability to work more flexibly.
- o Reducing number of formal meeting rooms and moving to a mix of flexible space hot desks, tub chairs, stand up work stations, chill out places, booths, confidential areas, that facilitated effective collaboration and conversations, reducing the need to constantly be booking meeting rooms.
- o Reduced carbon footprint through reduction in properties, more efficient use of buildings, increased recycling and reduced staff travel.

- **Managing Expectations – What will it mean for me?**
  - o All staff had a laptop and a headset.
  - o All staff had wifi enabled telephony.
  - o All desks had a chair, keyboard, mouse and screen.
  - o All staff had access to 'follow me' printing to print anywhere in the building.
  - o No desk belonged to an individual which increases collaboration and learning.
  - o Staff could sit anywhere in the building to work.
  - o Meeting rooms were only used as the exception for confidential/board type meetings – This is a behaviour change too and one that is a difficult to break!
  - o Managers do not need to be sat with staff; trust staff and manage by outputs – behaviour change that will need to be constantly reinforced but productivity will increase.
  - o If away from a desk for more than 2 hours at a meeting you clear your desk.
  - o Staff had mini lockers for personal items.
  - o Policies were revisited to ensure they were fit for purpose, engaging staff that flexible working and hours is encouraged, as it has proven to increase productivity.

GOVERNANCE

- **Effective Governance – Using a PRINCE2 approach I considered 'tailoring' and determined key documentation** (PID, Comms Plan, Stakeholder Plan, RAID Log, Gated Reviews, Lessons Learnt, Closure etc). I managed governance to change behaviours on this programme in 3 tiers;- 1) Strategic 2) Operational 3) Staff. Aligned to this were my Programme/Project Boards with delegated budget to manage by exemption, facilitate feedback/effective decision making, highlight key Risk & Issues, manage Requests for Change (RFC's) and identify key communication to cascade. I set delegated levels of control for tolerances against time/cost/quality. Escalation routes and levels were clearly defined at all 3 tiers.

Director Workshops
Strategic Programme Board

Manager Workshops
Operational Project Board
BCM/H&S/HR/Equalities/ICT/Property Reps

Staff Awareness Sessions
Business Change Manager – Staff Rep

UNL⬤CK CHANGE LTD

GAINING ENGAGEMENT

- **Completed Impact Assessments/surveys to compare** - I baselined 'As Is' status and mapped 'To Be', to identify what needed to change and how we were going to do it.

- **Vision/Values –** A clear vision was important and I involved staff in its creation. The team devised this Vision Statement:-

    "To ensure the best use of our working spaces, working hours and working methods, to best connect with our colleagues, residents, partners, service users and customers".

- **Stakeholders –** I held workshops to identify/suppliers/partners, working together, mapped level of influence/interest, completed profiles and held interactive workshops and used various tools such as SWOT/PESTLE/MOSCOW.

- **Director Workshops - Strategic Programme Board Level** – I did not assume all Directors were engaged and would embrace the changes, I commenced at the top tier and included the Chief Executive. I held workshops that covered the need to change, how we were going to deliver it and confirmed the benefits to be realised. I used examples of an old-fashioned management style and called out some examples; ie; *"I cannot possibly manage my team if they are not visible to me, I do not trust them to deliver".* I identified some key statistics to back it up I.e.; in staff surveys the future workforce have "*advised they wish to have greater flexibility in how and where they can work and the technology to support it*". It has proven that productivity and outputs increase when staff are empowered and trusted. I moved CEO and Directors into the new ways of working and new environment first, leading by example.

- **Operational Manager Workshops - Operational Project Board Level** – I provided tips and toolkits for Managers to effectively manage staff remotely based on outputs. These Managers are the key staff to engage as they are the biggest influencers. Each service area had a representative on the Operational Project Board. The Board included the Business Change Manager, representation from Health and Safety, Equalities, HR, ICT, Communications and Property. I covered key iterative lessons learnt based on solutions, assigned actions/owners timeline to ensure they came to fruition and improved.

- **Staff Awareness Workshops – Feed into Project Board through their Business Change Representative –** I covered the need for change and clarified what it meant for teams/staff. I outlined what activities staff can expect to see next and expected timelines for delivery. Any emerging issues from this group were escalated to Project Board. I asked members of staff from

teams who had already implemented the change, to talk to others about it, rather than it being Programme/Project Manager led, this increased engagement. A Head of Service from Highways volunteered to speak to another County Council about the success of the programme and the difference/benefits it made for their team.

- **Listen** - Through Business Change Managers, I listened to my stakeholders, to understand how their part of the business operated - one size does not always fit all.

- **Specialist Equipment -** All staff were asked to complete an electronic DSE Assessment as this is required under the Health and Safety at Work Act 1974. If any key concerns emerged, the staff member was referred to Occupational Health (OH). Specialist equipment was only issued when assessed by OH and approved by Health & Safety as being required. Health & Safety liaised with the staff member to ensure the right equipment was provided and assisted with setting it up.

- **Equalities Champion –** There were staff who had a disability, disabilities are not always visible. It was important these staff felt supported and could undertake training. I had a lady with a sight impairment as our 'Equalities Champion'. There is a lot to consider here, i.e. braille in lifts, hearing loops in meeting rooms, rooms to enable prayer, colours of lockers so they can be seen by those with sight impairment, installation of Dragon speech recognition software (where agreed is required), automated doors for wheelchair users, space planning (the right distances on floor plans to enable wheelchairs users access around the building) all areas must be accessible; toilets, photocopier, kitchen etc – even down to the carpet being a specific type that facilitates easy movement of wheels for non-motorised wheelchairs.

- **HR & Staff Engagement Policies** – Through effective programme governance, I ensured a link to HR SME was established to help drive culture change i.e.; flexible working.

DELIVERY

Strategic/Business Plan with SMART objectives (A plan fancy that!) I wrote a full Project Initiation Document (PID) that was cascaded, understood, and contributed to by key Stakeholders. The scope was clearly defined and articulated. I ensured the objectives linked back to attainment of strategy – if it does not, its ok to question why are you doing it?

Workstreams – I had 'Themed' workstreams; Building Works/ICT Infrastructure/Furniture/Smart Kit.

Communication Plan - I compiled a plan by defining the most effective methods for comms, outlined the meetings structure to facilitate effective cascade. I defined inputs, outputs, attendees, frequency, method, role of Chair and Notetaker. Communication was tailored for the relevant audience. The plan was agreed with key stakeholders and visible to all.

Project Team – I defined clear Roles and Responsibilities which are required for successful implementation. I mapped these using a RACI Matrix (Responsible, Accountable, Consulted, Informed). The Programme comprised:- Senior Responsible Officer (SRO), Programme Manager, Project Manager, Change Manager, Project Support/PMO, Worksteam Leads, specialists as required Ie; ICT/Property/HR/Equalities/Communications. A useful tool I completed with the Project Team was Belbin's Team Inventory. You can make it fun for the team and do it yourself, it is interesting to see the results. How did that help me? It enabled me to find out more about my team and how I manage them as individuals, to obtain the best engagement, motivation and results. I am sure most of you have come across this, the Belbin Team Inventory is a behavioural test, also called the Belbin Self-Perception Inventory, Belbin Team Role Inventory. It was devised by Meredith Belbin to measure preference for nine Team Roles; he had identified these whilst studying numerous teams at Henley Management College.

https://wwwf.imperial.ac.uk/bioengineering/admin/2017_18/EDPProjectCode/Belbin%20team%20roles%20exercise.pdf

THE 9 BELBIN TEAM ROLES

				Team Role Contribution	Allowable Weakness
Thinking	Plant	PL		Creative, imaginative, free-thinking. Generates ideas & solves hard problems.	Ignores incidentals. Too pre-occupied to fully communicate.
	Monitor Evaluator	ME		Sober, strategic and discerning. Sees all options and judges accurately.	Lacks drive and ability to inspire others. Can be overly critical.
	Specialist	SP		Single-minded, self-starting, dedicated. Provides rare knowledge and skills.	Contributes only on a narrow front. Dwells on technicalities.
Action	Shaper	SH		Challenging, dynamic, thrives on pressure. Has drive to overcome obstacles.	Prone to provocation. Offends people's feelings.
	Implementer	IMP		Practical, reliable, efficient. Turns ideas into actions and organizes tasks.	Somewhat inflexible. Slow to respond to new possibilities.
	Completer Finisher	CF		Painstaking, conscientious, anxious. Finds errors. Polishes and perfects.	Inclined to worry unduly. Reluctant to delegate.
People	Coordinator	CO		Mature, confident, identifies talent. Clarifies goals. Delegates effectively.	Can be seen as manipulative. Offloads own share of the work.
	Team Worker	TW		Co-operative, perceptive and diplomatic. Listens and averts friction.	Indecisive in crunch situations Avoids confrontation.
	Resource Investigator	RI		Outgoing, enthusiastic, communicative. Explores opportunities, develops contacts	Over-optimistic. Loses interest once initial enthusiasm expires.

© Copyright 2011 3Circle Partners LLC

10

Project Plan – My plan was realistic and worked for the business i.e. Some service areas may have Statutory Deadlines/key peak times. I factored in key dependencies, in particular any reliance on 3rd Party Supplier deliverables. Key milestones were identified and called out. I allowed adequate time for training; too often technology is rolled out without being thoroughly tested, or any training support provided for staff. I built contingency into the plan and factored in key holiday periods as I knew my resources would not be at full capacity during Summer Holidays, Christmas and Easter! This enabled me to deliver ahead of schedule. Never over promise, under deliver, you lose credibility fast.

PREPARING FOR THE CHANGE

- **Problem Solve –** Acknowledge and accept there will be some. I used Appreciative Inquiry technique (see below), with interactive workshops to solve problems with solutions. Effective facilitation was key to capture actions/owners/timeline for delivery to ensure improvements happen.https://positivepsychology.com/appreciative-inquiry-process/

- **Branding** – I felt was important and staff contributed to design of the logo (please see below).

- **Design** – Involve staff in the planning of any floor designs, they loved seeing their ideas come to life.
- **Guided Tours** – The programme was managed in phases. I organised teams who had not yet moved to undertake guided tours by those who already had – 'show and sell!'

- **Myth Busters** – Staff devised some fun fliers and posted them around the building and on the intranet I.e.; you cannot eat at your desk.

- **Intranet Mini Site –** The team created a branded intranet site with Q&A, tips and tools, latest news/updates.

- **Clear Out Zones** – I established zones where staff could leave old equipment and unwanted paper.

TRAINING – SUPPORTING MANAGERS AND STAFF

- **Learning Styles –** I organised training to incorporate how we all learn in different ways; some learn more by seeing, others by doing. The training had a mix of blended learning i.e. learning modules, virtual classrooms, lunch and learn, material on internal intranet.

- **Specific Training for Managers was key** – Learning and Development tools were produced such as; 'Top 10 tips to manage a remote workforce'. Managers were advised to have regular catch up sessions with their teams, effective line management and signposted to consider virtual body language/ wellbeing/mental health, leading with Emotional Intelligence. Managers organised fun team evening on-line events, such as quizzes with wine and nibbles and dress down Fridays.

Managers also got to know more about their staff by interacting with their home environment, meeting family and pets.

- **Mindfulness -** There are currently some deals around to help with mindfulness, which given recent events, it is important not to forget your own well-being. The one signposted on Linkedin was Headspace. https://www.headspace.com/

- **Lunch and Learns** – I set up technology specific sessions where staff could try the technology and made it fun, you are all in it together!

- **SME's/Champions -** By having SME's and Business Change 'Champions' I asked for nominations rather than people who are told to do it, people who volunteer are generally more positive advocates for change. These staff came from within the relevant business area and were trusted by staff to resolve issues, support staff with the change and represent the voice of staff at Operational Project Board meetings. The list of SME contact details was shared on the micro site and they were given the status of 'SME/Champion'.

- **Floor Walkers** – I deployed these during 'Go Live' to support staff and help with any issues, their role must be clearly defined.

- **Pair Generations** – I paired Generation X & Y staff with Z(Apprentices/Graduates) to improve technology learning for those less confident with new technology.

- **Induction –** I ensured that all Induction packs (through HR link) were up to date to reflect required change.

- **You Tube/Microsoft** – I had the luxury of a wonderful Training Team but with budgets diminishing, we need to be innovative and utilise and share free resources. There are lots of videos on use of Zoom and MS Teams, use them to train if you do not have the luxury of a good trainer. Microsoft provide some good overview videos as part of their support site: https://support.microsoft.com/en-gb/office/microsoft-teams-video-training-4f108e54-240b-4351-8084-b1089f0d21d7

Expect to have to go back and re-enforce your messages, whilst the new environment promotes change, people easily return to old ways! **Do not forget to celebrate success!**

- **Videos** –Staff worked together to make 'Smart Office the Movie' which was posted on the intranet to enable staff to visibly see the difference. I am very proud to have been involved with this Programme. It certainly helped a large organisation to react quickly and maintain vital services when COVID-19 hit. The success was down to a fantastic team of people, all working together with enthusiasm and commitment to make it happen. We also had fun along the way! Below is the movie staff made and a testimonial from a key stakeholder who was initially concerned how the changes would impact their team, due to the specialist nature of how they operated. Working together through the transition, we made it successful for the service.

http://media.licdn.com/embeds/media.html?src=http%3A%2F%2Fwww.youtube.com%2Fembed%2FFIbIZV0hYdg%3Ffeature%3Doembed&url=https%3A%2F%2Fwww.youtube.com%2Fwatch%3Fv%3DFIbIZV0hYdg&image=http%3A%2F%2Fi.ytimg.com%2Fvi%2FFIbIZV0hYdg%2Fhqdefault.jpg&key=b7276e97d3f840f38fbdb95eb1242b10&type=text%2Fhtml&schema=youtube

UNLOCK CHANGE LTD

Testimonial

> *"I've worked closely with Becky and her team for a couple of years now as they firstly prepared and then implemented the Group's move into SMART office. No mean feat for such a large group of engineering traditionalists! The fact that the move was accomplished with no drop in service delivery was not just testament to Becky's good leadership and skilful management of the process but fully reflective of her pragmatic and proactive approach, her commitment to openness, early engagement and not least to her unfailing sense of good humour. Professional, positive and supportive."* **(Strategic Manager Traffic & Transport Development)**

I also attach a recent presentation (please see below and double click on the slide), I compiled on the People elements of change at the recent Sqwyz Transformation Community Network event. This prompted me to pull all my learning together to create this Case Study which I hope adds value. If anyone wishes to know more, it would be great to hear from you.

People

WELCOME

Becky Lock
Transformation Programme Manager
UNLOCK CHANGE LTD

Rebecca Lock **(PGDip, MIIM)**
Programme, Project Manager & Change Consultant
"UnLock Your Organisation's Potential"

📧 UnLock Change Ltd, 113 Redlake Drive, Taunton, Somerset, TA1 2RU.
☎ (07766 746901)
Email: info@unlockchange.co.uk
Linked In: https://www.linkedin.com/in/rebeccalock1/