



D2L

**The Guide to
Change Management for Associations**

Table of Contents

INTRODUCTION	
WHERE CHANGE COMES FROM AND HOW TO MANAGE IT EFFECTIVELY	3
CHAPTER ONE	
WHAT IS CHANGE MANAGEMENT?	4
CHAPTER TWO	
WHY ASSOCIATIONS NEED AN EFFECTIVE CHANGE MANAGEMENT PROCESS	6
CHAPTER THREE	
THE ROLE COMMUNICATION PLAYS IN CHANGE MANAGEMENT	7
CHAPTER FOUR	
HOW TO IMPLEMENT A CHANGE MANAGEMENT PLAN	9
CONCLUSION	
MAKE YOUR APPROACH TO CHANGE AS UNIQUE AS YOUR ASSOCIATION	17



Where Change Comes From and How to Manage It Effectively

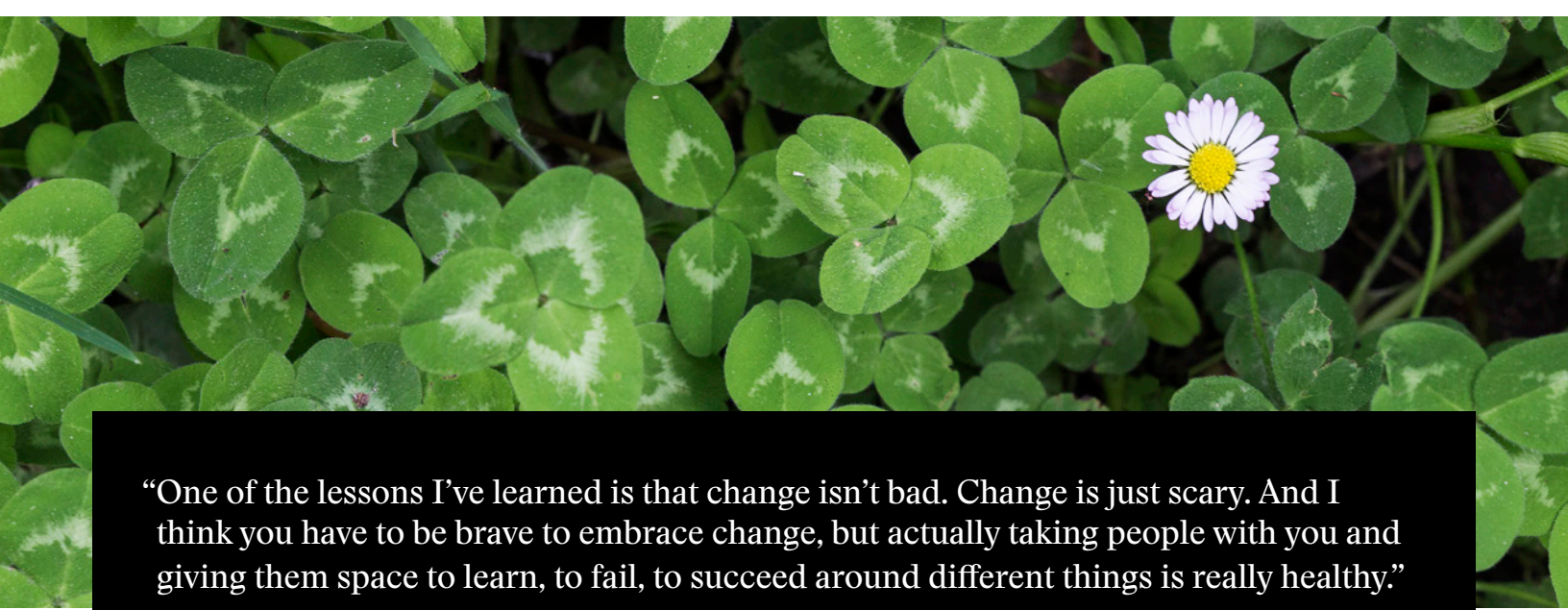
There are two constants in life: Change and resistance to it.

As humans, we're **hardwired to resist change**. Part of our brain interprets change as a threat to our safety and releases fear hormones to help us physically protect ourselves. This is the underlying reason why so many people are reluctant to embrace innovation even when the rational part of the mind can understand its benefits.

It could be new software that reduces administration time by half or a new community or learning platform. Whatever its form, people are usually slow to embrace change. We're attracted to the idea of this future working environment where life is easier, but we reject the mechanics of how to make it a reality because we're comfortable with the status quo.

We know that most change programs fail to achieve their goals due to **employee resistance and lack of management support**. So, while many initiatives make rational sense to everyone in the organization, you need your teams to champion them to get strong results.

In this guide, we'll share everything you need to know about change management, including what it is, why it's important and how to implement a change management plan. Read on to find out how you can encourage your staff to overcome the psychological cost of being too attached to the present so that your association can stay relevant and better serve staff, members and the industry you represent.



“One of the lessons I’ve learned is that change isn’t bad. Change is just scary. And I think you have to be brave to embrace change, but actually taking people with you and giving them space to learn, to fail, to succeed around different things is really healthy.”

Linden Muirhead, Chief Technology and Learning Officer, The London Institute of Banking & Finance

What Is Change Management?

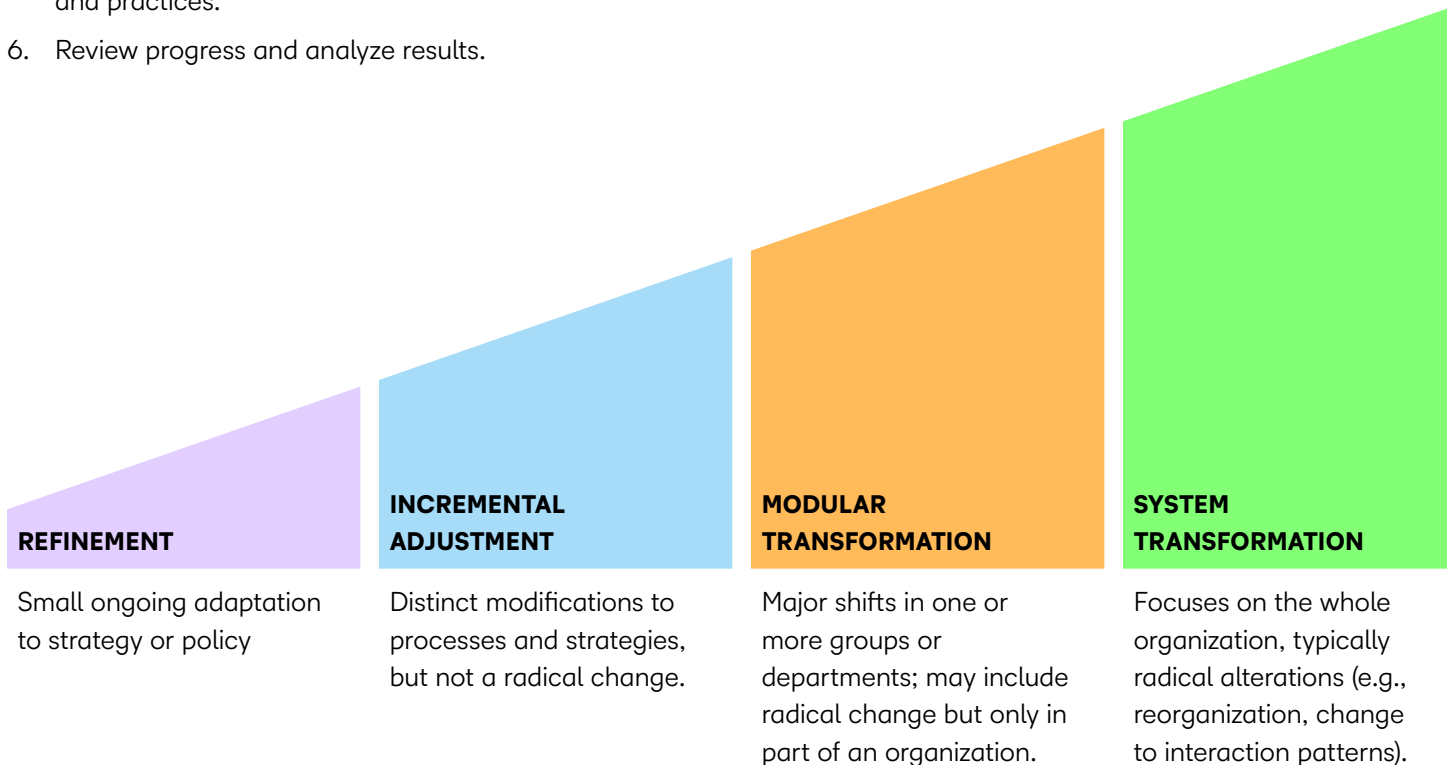
Change management is a systematic approach to implementing new processes or procedures across organizations. It usually involves a multistep plan that divides the project into manageable parts.

At a high level, it could look something like this:

1. Create a vision and plan for change.
2. Prepare your organization for change.
3. Implement the changes.
4. Give staff the support they need.
5. Embed the changes within your organization's culture and practices.
6. Review progress and analyze results.

WHAT IS THE “CHANGE” IN CHANGE MANAGEMENT?

Change will vary in size, scope and scale. It could be as small as refining a process that affects one group of staff. It could also be as broad as a system transformation—one that fundamentally transforms how members interact with you.



Source: "Organizational Change Management: A Critical View," by Rune Todnem

WHERE DOES CHANGE COME FROM?

Change management can involve the adoption of new technology, mergers and acquisitions, personnel changes, rebranding, or a combination of these.

Examples where change management practices could be helpful:

NEW TECHNOLOGY Technology is constantly advancing, meaning organizations will need to replace legacy systems.	The association moves to a new community platform to nurture engagement and help members build connections with each other. A learning management system (LMS) is introduced to upgrade and enhance education programs.
MERGERS AND ACQUISITIONS When two associations join, the staff at both will need to adjust to new processes.	Employees joining the parent organization are reorganized to fit into the existing structure and hierarchy. The merged company undergoes a rebrand, requiring employees to replace existing assets with new ones.
PERSONNEL CHANGES Staff turnover is a reality for all associations, but how they manage it differs.	A program manager leaves to pursue a new opportunity, changing how staff assigns and completes projects. A team grows by 50%, leading to a change in day-to-day activities and responsibilities.

The most durable change management plans find ways to inspire staff to champion innovation. The goal isn't simply to implement a new process or system. It's to find a new way of thinking in which everyone understands the purpose and supports the new approach.

Remember the three p's of effective change management: **planning, patience and persistence.**

THE HUMAN SIDE OF CHANGE

Involving employees in making decisions **increased wins by 15%.** Giving employees primary ownership of implementation planning **did the same by 24%.**

Why Associations Need an Effective Change Management Process

One of the primary responsibilities of association leaders is driving growth for their organization. In some cases, this means rallying behind flagship programs that members have come to rely on. In others, it's about pushing the envelope and finding innovative approaches that meet the dynamic needs of an evolving membership.

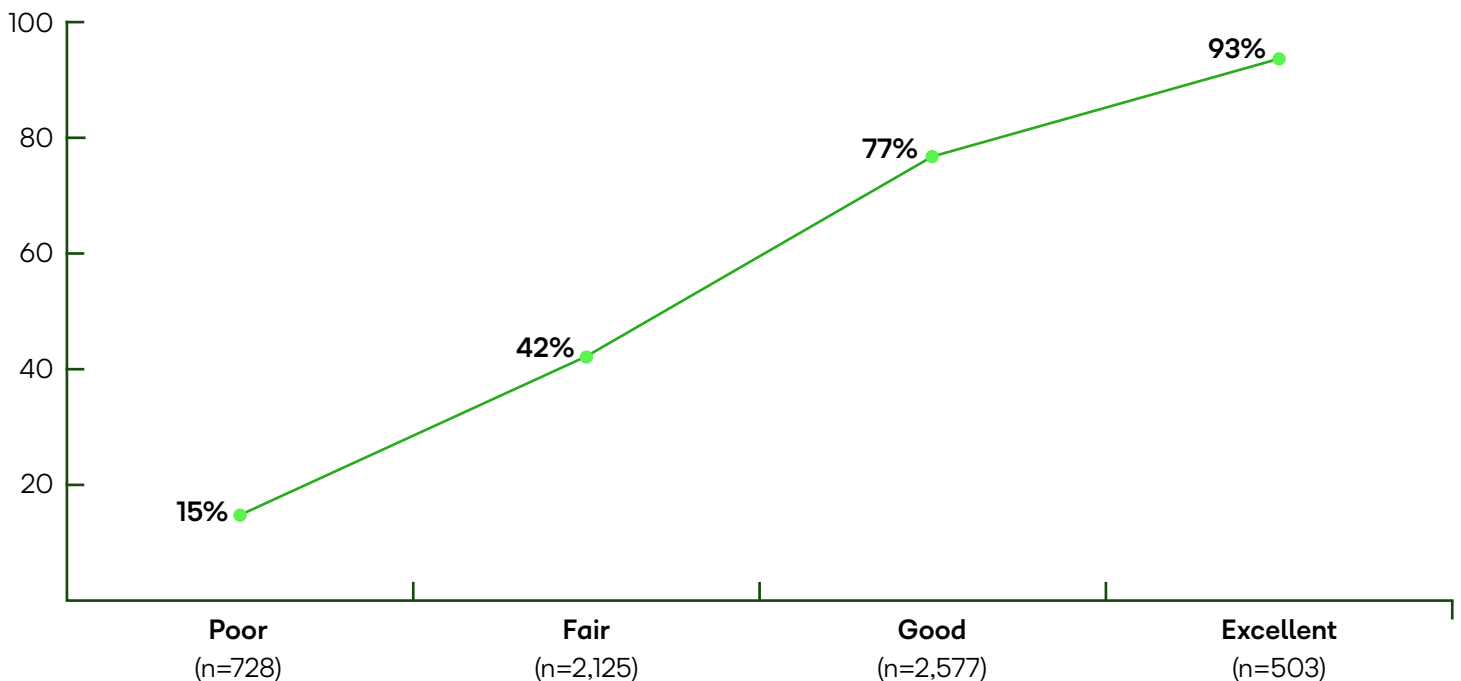
But even for the most seasoned leader, steering the ship through periods of transition can be challenging. This is where change management practices come into play. Not only can they give leaders confidence in the process, but they can also empower staff with a clearer understanding of where the changes are coming from, what they'll look like, and how they'll be implemented.

CHANGE MANAGEMENT CAN BOOST PERFORMANCE

Studies show that projects with excellent change management are six times more likely to meet objectives than those with poor change management. Does that mean if you're not going to hit a home run, it's not worth stepping up to the plate? No.

Don't let perfection be the enemy of progress. When it comes down to it, any change management is better than no change management at all.

Correlation of Change Management Effectiveness With Meeting Objectives





CHAPTER THREE

The Role Communication Plays in Change Management

When an organization undergoes a significant change, it's natural for people to get overwhelmed. Immediately, their thoughts will turn to how it impacts them. They'll need to process those feelings before they can begin to fully comprehend the change.

That's where effective communication can make a big difference. You'll want to keep people informed while at the same time getting feedback to help people understand:

- why the change is happening
- where to get support
- what additional impacts or risks need to be addressed

The Institute for Integrative Nutrition (IIN) rolled out a major change in 2020, using an LMS to bring its full suite of curriculum offerings online. The company's Chief Academic Officer, Nora McCaffrey, detailed just how important communication is for successful change management in our webinar, [Catalyst for Navigating Change](#).

"We did constant and repeated share-outs," she said. These were given biweekly to start, sharing progress updates and insights with executive leadership and the company's board of directors.

FOCUSING ON FEEDBACK

The team also insisted on hearing and actioning feedback from those closest to the end user.

“We had sit-down time with our student services team, the individuals who are constantly on the phone with our students, hearing all of their ailments and successes,” McCaffrey explained.

But the work didn’t stop there: They ensured that all stakeholders had a chance to review the learning environment and courses so they could offer their feedback.

To do this effectively, they employed different methods of communication to reach the different function areas that would need to see the progress. They kept in mind three tenets along the way:

- Who’s the audience?
- What’s the purpose?
- What’s the best method to reach them?

“We shopped it around everywhere so that they could see the development and progress and that really grounded them in what they’re seeing today, but it also gave them an opportunity to give their feedback before we went into full production,” she said.

“We also answered a lot of questions. And when we had our systems to go live, we went through screen by screen what the experience was. We had our enrollment team giving feedback. People felt heard. We implemented their feedback, or we would put it on a shortlist to be prioritized later if we couldn’t get to it right away.”

This approach ensured that the team had a chance to overcome their initial thoughts about what the change might mean for them, in turn ensuring they could understand the bigger picture.

BIG-PICTURE PLANNING

When the process was nearing completion and it was almost time to roll out the entire new structure, McCaffrey wanted to enable each team to have its say. While some team members focused on the day-to-day impact and questions, she made sure to keep the bird’s-eye view in mind.

“A big thing that I found very impactful was I also made sure they understood the big picture. ‘What are we striving for? Let’s come out of the weeds for a minute and see where we’re going.’ And that was really impactful because it helped them see what the road map was.”

Since rolling out its new online platform with D2L Brightspace, the IIN has continuously communicated with its end users, using their feedback and analytics within the LMS to make course improvements.

You can learn more about IIN’s change management strategy by [watching the free webinar on demand.](#)





CHAPTER FOUR

How To Implement a Change Management Plan

The first thing you need to do is assess the type of change you want to implement, which will inform how you want to execute it.

The first thing you need to do is assess the type of change you want to implement, which will inform how you want to execute it.

CATEGORIZING TYPES OF CHANGE

You can classify change into broad groups according to scale, origin and style of implementation. Since we've already discussed scale, we'll examine the other two facets more closely.



ORIGIN

Change can be planned—part of a strategic shift the association plans and accounts for over time. It can also be reactive, with external factors such as government legislation or macroeconomic conditions prompting quick consideration and action.

It could also be both together. If membership renewals aren't meeting their targets, the leadership team might push to reallocate parts of the budget to help hit quarterly

goals. Those are responsive changes. To address long-term challenges, leaders might look to lean into new engagement tactics or revamp their offerings to better deliver the value members are looking for. Those are planned changes.

Having a sense of the change's origin will affect the scope and duration of the project.

PLANNED

Planned change is the process of preparing the organization for new goals or a new direction. Examples include introducing new systems of technology, changing reporting lines or introducing a new strategic plan. In this case, the change is anticipated and comes from the top down.

RESPONSIVE

Responsive change entails making regular, targeted adjustments as and when necessary. This change relies on collecting data and assessing the experiences of staff, external stakeholders and customers.

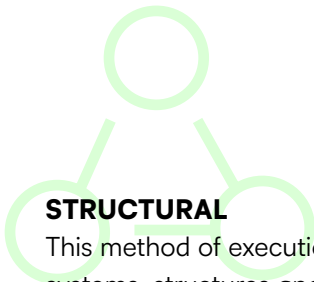


IMPLEMENTATION

Structural change tackles processes and procedures, whereas cultural change focuses on how people think and act.

Arguably, as with origin, structural and cultural changes are often intertwined because it's hard to separate what people do from how they think. If you successfully introduce a new technology tool—which is a structural change—the open-mindedness and positive attitude toward the technology that ensues can be classified as a cultural shift. Likewise, implementing a cultural change where colleagues are encouraged to share their processes or critical paths could lead to a structural change in the way they share information because there is now an increased demand for the sharing of ideas.

Start with where it's coming from.



STRUCTURAL

This method of execution focuses on the systems, structures and procedures connected to the organization's intended goals. In business, structural changes emphasize specific systemic, structural and operational functions that need to be improved, like introducing a new instant messaging software that makes it easier to communicate across the company.



CULTURAL

This method refers to change that addresses the way people think. If you want to improve organizational ethos and bolster initiative-taking, you are considering a cultural change. For a business, that could mean encouraging people to fail so that they can learn from their mistakes, or changing the dress code so that people feel more comfortable wearing what they want without judgement.

The 6 Steps of Change Management

We've assessed the leading scholarship on change management and highlighted the key steps to consider when creating and implementing a change management plan.

1. CREATE A VISION AND PLAN FOR CHANGE

People will more easily be able to adapt to change if you show them your compelling vision for what the future will look like. "Providing a solid foundation of awareness to the stakeholders in your project will help them view change as a positive, recognize the strategic objectives being targeted, and ultimately motivate the adoption of change," says Michael Laird, Learning Strategy Consultant at D2L.

Think of your vision as the heart of your change. It's the idea you're going to keep coming back to when the implementation feels challenging. This is also why it's important that creating your vision be the first step in the process. The more time you take to understand your goals, the better prepared you'll be to articulate them to your staff and answer their questions.

As you start to create your plan, consider:

- What strategic objectives will this change help the association achieve?
- What does success look like?
- Which metrics will you use?
- Who will be in charge of the implementation process?
- What specific policies and procedures will be followed?
- What is not included in the project's scope?

While having a strategy is vital, your plan needs to leave room for unknowns or potential obstacles and outline contingencies and tactics for overcoming them. As an added benefit, recognizing that change is never perfect provides an opportunity to promote risk-taking by your change adopters as they risk trying new things as part of the change.



2. PREPARE YOUR ORGANIZATION FOR CHANGE

Your organization must be prepared logistically and culturally to successfully pursue and implement change. But before you get into the logistics, do the cultural groundwork so your staff feels positive about the change.

Help your staff understand the need for change by encouraging them to reflect on the pain points you're looking to solve. If you can excite and enable them, they'll more likely become change catalysts, ready to persuade naysayers and reduce resistance during the next step.

Remember, although you may expect people to find your reasons compelling naturally and immediately, they won't be able to buy into the plan until they know how it will affect them personally.

"In conjunction with a strong vision and plan," says Laird, "You must take the time to articulate an answer to the questions, 'Why is this change being made?' and 'How is this going to impact me?' before others can feel comfortable enough to align their vision of the future with your vision of change."

Know How Change Impacts People

SELF CONCERNS

TASK CONCERNS

1

2

3

Information Concerns

- What is the change?
- Why the change?
- When will the change happen?

Personal Concerns

- How will this impact me?
- Can I still use the tools I've been using?
- What's in it for me?
- How much time will it take?

Management Concerns

- When is training?
- When do we get access?
- How do I do it?
- Can you show me that one more time?

IMPACT CONCERNS

4

5

6

Consequence Concerns

- How do I use this to achieve _____?
- How do I do it better?
- When can I have some help refining this?
- What can I do to improve my results?

Collaboration Concerns

- How do we do it better together?
- What can we do to improve our results?
- Who else is using/wants to use these approaches?
- Where can we meet to exchange ideas?

Refocusing Concerns

- What needs to be true for widespread innovation to happen?
- What systems and processes help staff succeed?
- How do we systematically improve quality/engagement/persistence/retention/etc.?

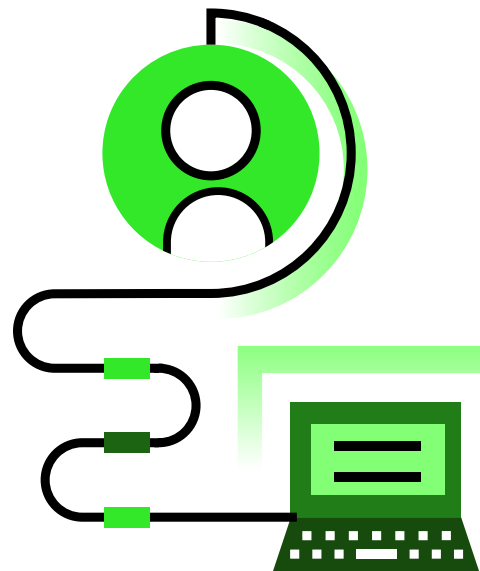


3. IMPLEMENT THE CHANGES

Once the plan is in place and people are on board, it's time to make it happen. This is where you shift gears—going from theoretical to actual.

Throughout the process, you want to find a balance between clearly outlining the actions that need to happen and milestones you need to hit while also acknowledging wins and successes.

Think about timing, too. Ideally, you want the actual implementation to happen during a slower time for the business. For example, you would want to avoid rolling out new accounting software right as your business would normally be wrapping up its year-end, causing unnecessary stress.



4. GIVE STAFF THE SUPPORT THEY NEED

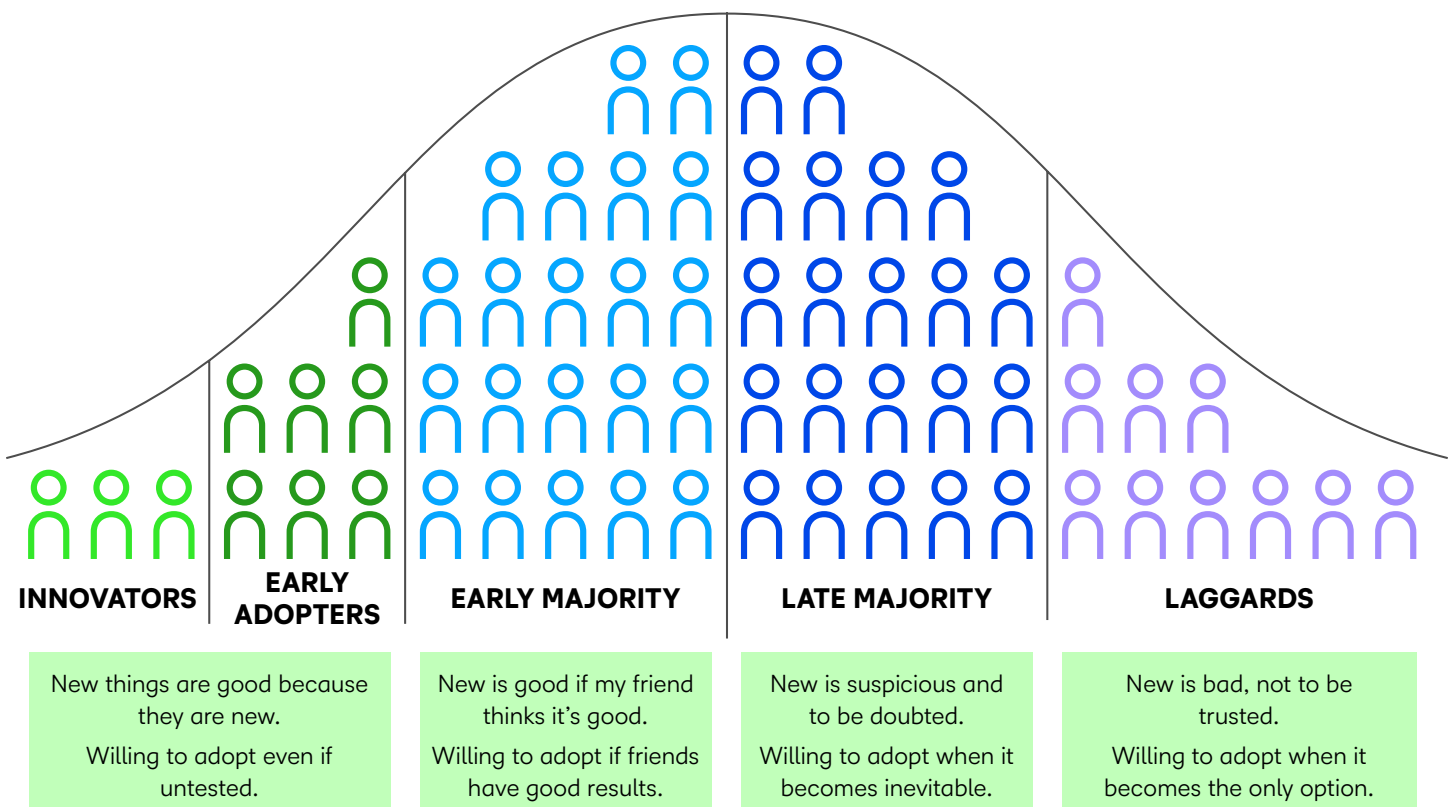
People typically approach change in one of five ways, ranging from the most willing to embrace it to the most reluctant:

- **Innovators and Early Adopters:** “New things are good because they are new.”
- **Early Majority:** “New is good if my friend thinks it’s good.”
- **Late Majority:** “New is suspicious and to be doubted.”
- **Laggards:** “New is bad and not to be trusted.”

You can use this model to create enablement and communication plans that are tailored not only to people’s specific roles but also their enablement type. After all, the needs of each group are different.

After figuring out who your early adopters are, you can enable them to demonstrate for their colleagues and champion the change. Peer validation can motivate other team members, giving them proof that the potential you touted during the planning stages is real, while also demonstrating that success is achievable.

Understand the People of Change



5. EMBED CHANGES WITHIN YOUR ORGANIZATION'S CULTURE AND PRACTICES

Once the intensive parts of a change are wrapped up, it can be all too easy for people to slip back into old ways of doing things. It's crucial not to let that happen. You must work consciously and consistently to embed change into the workings of the organization.

For example, if you stop sending hard copies of reports and transition to an online tool, tie that piece of administration into something your employees already do, like quarterly reporting. If you stack a change on top of well-formed habits, it is more likely to stick.

6. REVIEW PROGRESS AND ANALYZE RESULTS

By analyzing and evaluating the impact of a change, leaders can learn whether changes were successful, unsuccessful or a mix of both. They can also learn lessons that can be applied to future projects.





CONCLUSION

Make Your Approach to Change as Unique as Your Association

Every organization—yours included—will handle change differently depending on the scale of the change, the speed with which they need to move, and the infrastructure and resources they have at their disposal to support it.

Research into change management can and should help guide you. But at the end of the day, no one understands your association in the same detail as you do. Your knowledge of what the support staff might need, and the expectations members have are invaluable to the process.






Laird asks leaders to remember: “Results of effective organizational change often cannot be measured immediately; meaning that the success or failure of effective change must be measured over time. While some positive impacts may be immediately evident, it is important to recognize that enhancing and sustaining change will take ongoing effort to achieve, evaluate and document.”



ABOUT D2L

D2L is a global learning innovation company, reshaping the future of education and work. We're leading the way into a new era of personalized learning, driven by the belief that everyone deserves access to high-quality education, regardless of their age, ability or location. Our signature technology products—D2L Brightspace and D2L Wave—enhance the learning experience for millions of learners at every stage of life, from the earliest days of school to the working world.

Learn more at D2L.com

-  /D2Linc
-  @D2L
-  @D2L
-  linkedin.com/company/D2L
-  ContactUs@D2L.com

GLOBAL HEADQUARTERS

151 Charles Street West, Suite 400
Kitchener, ON, Canada
N2G 1H6