



ESSENTIAL STEPS FOR SUCCESSFUL CHANGE MANAGEMENT

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Essential Risk & Business Insight for Law Firms

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In our latest White Paper, our guest author David Green, Co-Founder of The Strategic Partner, outlines the key steps which are vital to the successful implementation of change in Law Firms.

Change is constant and the need to evolve as a business will make the difference between profit and loss. This change can be voluntary or forced, arising from any aspect of your firm - financial, regulatory, statute lead, technological or operational.

It is a fact that a business not prepared to change will soon fall behind its competitors as others strive to evolve. Those businesses who truly want to embrace change must ensure that they approach it in the correct manner. Often the most significant barrier to change is not the willingness of the owners or managers but the staff. Obtaining buy in from staff will significantly influence the success or failure of any change.

When change is discussed it is often considered to be for negative reasons - e.g. a business has hit troubled times financially and needs to reduce expenses, or technological advancement results in necessary job losses.

However, change can be and often is positive - growth due to a business doing well, moving into new sectors, additional recruitment due to new clients coming on board, or even moving to bigger and better premises.

Even a positive reason for driving change can be a disruptive influence if managed badly.

Rather than focusing on the operational or financial needs of a business, in this article I want to discuss the impact on staff and how to address the challenges they can pose during an uncertain time for them. Employees are a major factor in any change management programme as without them on board it will be set to fail.



The Challenge

Working with businesses to assist them with managing change, too often we find that the need to change has been recognised and discussed by the Partners/Directors of firms, but the staff have not been involved and are expected to adapt willingly.

It can be frustrating when a business has a positive reason for change, but encounters resistance from some in the business who will feel the personal impact, and this can lead to negativity setting in.

In our experience, there are some key steps which are vital to the successful implementation of change. Every business or consultancy will have an approach which they feel works, but every strategy must put the staff at the heart of the change management programme or risk dealing with the fallout if they resist.

Change arises for a variety of reasons. Responding quickly and effectively is key to any successful business. Often, change is not a simple desire to improve profits, it comes due to a shift in the law or regulation, or simply because the old way of working is out of date. Technological developments are constantly arriving in all sectors and failure to embrace this puts a business at risk.

The challenge for business owners is to identify the need to change and take action to implement that change successfully. The immediate impact of change is highly likely to affect staff and recognising their issues and concerns is vital to a successful change management programme.

The Process

- **Recognise** – The first step to change is always recognising the need. That should be obvious if you understand your business, have set financial and operational goals, and have monitored performance. Watching how your business performs against realistic plans will provide the first diagnostic indicators that change is needed. However, change is often thrust upon a business, for example due to regulation or statute, but there is always enough time to affect a change management programme as long as the need is recognised and responded to as it arises.

- **Consult** – Once the need has been recognised, it is imperative that the staff are consulted. They will probably be aware that changes are needed. Whether industry news is discussing a change to the market or rumours have started within the business, they will have an idea that something is about to or has to change. The sooner a business is able to talk to its staff, the quicker the 'buy in' will start. Whatever the reason for the need to change, whether positive or negative, most will respect the owners for taking action, but they will respect them more for discussing directly with them the need for change and what impact it will have on them. The size of the business will dictate who needs to be consulted - is it everyone, or select people who may have been nominated to represent a group? It may also be sensible to involve some individuals who may not be directly affected to ensure balanced views are obtained.
- **Identify** – Talking with the staff will help identify their concerns. You may not be able to stop the change from coming, but its impact can be fully appreciated once the concerns of those affected are identified and where possible addressed. Once the staff have established that you are taking their views into account, buy in will come much faster.
- **Understand** – Take the time to understand the concerns and how the changes may impact. If you accept any of the points identified as causing concern, you can respond to them. Not every issue can be overcome, but you can aid understanding for the staff by explaining the reason for the change and why some of the issues they raise may be understandable but cannot be overcome.
- **Adapt** – Where you can adapt, do so. Listen to the ideas and suggestions of the staff, and be prepared to change your own views and plans for implementing change. The staff are often much closer to the service delivery (and therefore the clients) than the owners or managers, so their views will have value.

- **Plan** – Having taken into account the thoughts and views of all and established a clear path to change, it needs to be carefully planned before any execution. Knowing what to do is often the easiest part of the task. Exactly how the plan will be followed through and how results will be monitored is vitally important. Where there is an impact on jobs, particularly job losses, ensure your message is clear and consistent so that you do not lose key people through a period of uncertainty. Be aware of the timings that the business needs to achieve the change and plan your change process to meet the needs of the business. Do not rush a change management programme or be too eager to get it in place too quickly. Ensure your plan is clear and those involved are aware of the time frame for delivery, and make sure you set key milestones to measure the progress.
- **Finalise** – When the consulting and planning stages are complete and the change is about to be implemented, take stock of where you have arrived and information gathered along the journey. This will be the last time to make adjustments before implementation. Gather your key team to review what you originally set out to achieve and if any final adjustments need to be made to achieve the ultimate goal.
- **Implement** – If you have gone through the preparation stages correctly, the implementation stage should be the easiest part. You will be aware of what change is coming, as will all of those involved in the process and the staff. Communication is key here as you push the change into the business, but this will ensure you have the maximum chance of achieving your goals.
- **Monitor** – Once you have implemented the change, ensure that you revisit your goals and objectives to ensure you are achieving what you set out to. Not all change will achieve the desired results and most changes will need adapting as time progresses, but that will not happen if you do not set new targets and objectives.

The Result

The impact of change will not always be a positive experience for everyone, regardless of the starting point and drivers. However, for change to be successful it has to be well thought out, discussed and implemented with a clear strategy and goal.

Change does not stop when the business has delivered its new way of working. Ongoing monitoring is essential - have targets been hit and goals met? If not, why not? Managers should be asking, "Do we need to change more?"

Change has to work, as failure could mean losses and losses could mean the end of a business (eventually).

At The Strategic Partner, we work with businesses through the change cycle. We find that it often helps to have an impartial view, a view that comes from outside your business but is informed by industry knowledge. You may well find that staff respond better to external expertise when being educated on the reasons behind necessary change.



About The Author

David Green is a co-founder of The Strategic Partner. After many successful years in the Insurance and Legal Sectors, he now works across a portfolio of businesses as an Investor and Owner, providing strategic support, financial management, operational input, business development and general consultancy and guidance.



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