

Navigating Change Management



Organizational Change Management is a part of year-end planning and considers what needs modification within the full organization. It includes any approach to transition individuals, teams and organizations using methods intended to re-direct the use of resources, business process, budget allocations, or other modes of operation that significantly reshape an organization. It is a decision making and implementation process based on conforming to a new operational standard, change in code, change in practice, change in operations, or change in requirements (industry & manufacturer). The process requires a full review of all pertinent information and resources to help ensure a smooth transition and operational effectiveness.

The Process is the sequence of steps or activities that a change management team or project leader would follow to apply change management to a project or change in operation. Change Management processes contain the following three phases:

- **Phase 1** *Preparing for Change*
- **Phase 2** *Managing Change*
- **Phase 3** *Reinforcing Change*

Change Management Process

PHASE 1 - Preparing for Change



Preparation begins by providing situational awareness which is critical for effective change management. A change management team will be identified and organized. Technical skills may be required, some team members should have strong project management, and people management skills. The team will consider the organizations goals and vision to define a change management strategy. It is not enough just to have 'sign off' – senior management must act as sponsors who advocate the change and can articulate the value to the organization.

PHASE 2 - Managing Change



This phase focuses on developing the plans that define the project activities, such as the communication plan. These plans will identify the "what", "when" and "how" of the strategy. This phase also is when the action begins, and the plans gets implemented. It is important to have comprehensive plan to ensure that each activity is effective in achieving its goal.

To be well informed and have a complete decision-making process it is recommended to have as much information as possible. Policies, procedures, rules, and guidelines should be based on current standards and best practices that have already been used and tested. All the points should be clear, simple, and easy to understand.

Change Management Process

PHASE 3 - Reinforcing Change



The reinforcement phase ensures that change is sustained. In this phase mechanisms are audited and evaluated to see if change has effectively taken hold. Teams will collect and analyze feedback to diagnose gaps in uptake and manage resistance. If necessary, any corrective actions will be implemented.

The Change Management Team will need to monitor the ongoing operations, performance, and schedule of the plan. Performance evaluations should be provided on a regular basis to highlight any adjustments whenever developments occur in the process. It is important to remain flexible and prepared for any changes required.

Possible Control Measures

- Equipment, facilities, and process
- Operations, maintenance, and inspection procedures
- Training, personnel, and communication
- Documentation
- Authorization of the workplan by the responsible persons through completion

Benefits of an Effective Plan

A plan that is effective will enable organizations to be “proactive” to a situation rather than “reactive”. It develops good working relationships (up and down an organization) with informed decision-making. This can prevent potential risks and increase current efficiencies substantially.

Examples of Change

Changes to Process Control/Instrumentation

- Monitoring of ongoing work activities
- Establishing a means of reviewing work
- Change orders and updates overtime
- Establishing a documented (digital) monitoring system
- Checking on building's electrical, waste management, water-use, gas consumption, etc.
- Implementing new work order systems

Alterations to Safety Systems

- Code-based, AHJ Orders (WCB, Safety Authority, Fire Departments)
- New fire alarm systems, panels, and detectors
- New suppression systems, gas based, water based
- New burglary alarm systems or monitoring company
- Access to management (security)
 - Cards
 - Fobs
 - Keys, etc.



Examples of Change



Changes to Maintenance and Inspection Procedures

- New Equipment
 - Documented (digital) maintenance procedures
 - Manufacturer requirements to maintain warranties
 - Inspection requirements based on device, use, location, critical operations, etc.
 - Safety procedures when operating a device
 - Code-based – AHJ (Worksafe, Safety Authority, Electrical Inspector, Fire Department, etc.)

Alterations or New Connections to Utility Systems

- Power Smart Systems
- Changeover of equipment – newer more efficient
- Mitigation of gas use for heat or process – heating system updates, furnace operations, boiler operations, on demand systems, etc.
- Water use – changes in environment, drought conditions, management
- Environmental controls, back flows, updates, fire protection systems, testing and inspection, etc.

Additions of New Process Equipment or Critical Business Systems (Software)

- Computer systems
- Operational Software
- Asset management software, work order systems
- ERM Software
- Inspection Software

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