



BARRY & COMPANY,
CHESTER L.L.C.

MAKING THE CASE FOR CHANGE a one-day leadership workshop

Objectives of the Workshop

To gain practical skills for building a solid case for undertaking change in an organization and persuading stakeholders to sponsor it. Participants will leave the seminar with the tools to lay the groundwork for launching transformational change efforts in their enterprises.

Syllabus

1. Context: to what sort of enterprises and situations do the skills in this seminar apply?
 - a. medium to large corporations with formal processes for starting change-related projects
 - b. companies, not-for-profits, and any organization of any size with people in leadership positions who have entrenched interests or for any reason tend to be resistant to change
2. What is "change"?
 - a. introducing a new product or service
 - b. discontinuing a product or service
 - c. acquiring or disposing of a business
 - d. changing branding, corporate identity, or marketing approaches
 - e. altering the business model
 - i. outsourcing
 - ii. offshoring
 - iii. automation and the use of other technical tools
 - iv. cost cutting
 - v. changes to the organization or governance model
 - f. (solicit others from participants)
3. When is change needed?
 - a. escalating costs
 - b. declining revenue
 - c. market opportunity
 - d. product or service obsolescence
 - e. new or increased competition
 - f. new risk identified/existing risk mitigation not sufficient
 - g. regulation change or audit finding (compliance)
 - h. (change for the sake of change?)
 - i. (solicit others from participants)



4. Selling the need for change
 - a. research
 - i. SWOT, costs, risks, obstacles
 - ii. clearly identifying stakeholders and the impact on them (who wins, who loses, who pays?)
 1. customers
 2. employees
 3. vendors
 4. investors
 5. (competitors?)
 - b. the business case
 - i. motivations: revenue growth, cost reduction, risk reduction
 - ii. quantification of costs and benefits
 - iii. impact of not undertaking the change initiative
 - iv. timeline, source of resources (especially human), and other project plan elements
 - v. success criteria
 - c. communication strategies
 - i. being able to clearly summarize the business case
 - ii. combating inertia
 - iii. anticipating objections
 - iv. one-on-one stakeholder discussions
5. Possible exercises
 - a. Develop business case and stakeholder approaches throughout the workshop based on an example explored real time (perhaps one under consideration at the company holding the workshop).
 - b. Break up into groups. Instructor provides a (flawed) business case document to each group (perhaps the same case, perhaps different ones), and after reviewing it, each group presents to the class ways it should be improved.

