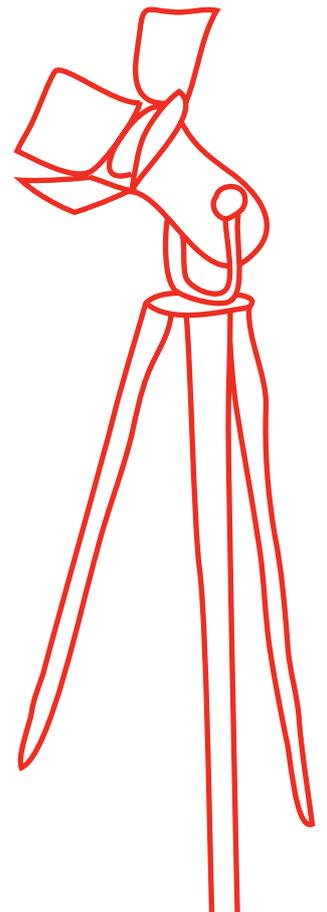# Case study

Successful Management of Change at Delta Lloyd

Pure measurement, targeted intervention

delta lloyd

"Pulse gives us an insight into each team's perception, so we can define targeted and customised interventions."

Tino Otsen
Change Management Delta Lloyd

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By far the majority of IT change projects place the emphasis on implementing new tools, systems and processes. That's surprising, however, because it's the people who have to work with them who determine their ultimate success. And yet they're often forgotten. But not at the insurer Delta Lloyd, which is working with its IT partner Logicalis SMC on a fundamental IT transformation being implemented using IT-Guardian, the best-practice ITSM model from Logicalis SMC. This will lead to a change in roles, responsibilities and necessary competences, with work being carried out on the basis of service chains. The whole change project is being supported by professional Management of Change. This involves the use of Pulse, a special tool that takes measurements at specified times during the project to gauge changes in the relevant employees' perception and acceptance with regard to the new way of working. The results lead to targeted interventions which boost the likelihood of success and accelerate the achievement of the intended benefits.

That's why Tino Otsen, who's responsible for Management of Change (MoC) at Delta Lloyd, is enthusiastic about Pulse. Together with his colleague Aad Timmer, Programme Manager at Delta Lloyd, and Robert Jan Simons of Pulse vendor Sentensor, he explains why.

Securing broad acceptance

Tino explains: "Projects are set up to achieve a new, desired situation. That's done on the basis of a schedule. The emphasis is generally on processes and systems. But people themselves develop, and what good are new processes and a good system if the people don't believe in it? If they don't understand why they have to work with it and even start to resist it? Then you achieve nothing. It has repeatedly been shown that a successful installation of processes and systems does not amount to a successful implementation and is no guarantee of a successful project. With Logicalis SMC we therefore decided right at the outset that we would focus on MoC. Choosing a best-practice model such as IT-Guardian means you make no changes to the working method and conform to the solution as delivered. That's a conscious choice. Securing broad acceptance of that requires a clear

explanation, continuing involvement and proper guidance, before, during and after the implementation. And I got enthusiastic when Robert-Jan came here and said he had a digital tool that could genuinely measure changes in adoption by relevant employees in order to take the right action. To that end we also appointed change agents (these were the team leaders, ed.), who have an important role in the communication and interventions as part of the change process."

Behavioural change

Aad: "At the kick-off of the project we informed everyone and explained why we had opted for this out-of-the-box solution. It's a best-practice solution and we said it must also be suitable for Delta Lloyd. We're therefore working on the basis of the processes, tools and roles that come with IT-Guardian. That means we can make a quick start because we can use what's already been devised in IT-Guardian. These are things we no longer have to discuss ourselves. That explanation is important because it means people really will have to work differently. It isn't that easy to change behaviour. People often try to have extra things included because they believe they're better or fit in with the old working method. We didn't do that. That was sometimes painful and left people in the wrong position. You have to take that into account. You have to deal consciously with the emotions, questions and doubts that arise at a particular time."

Workshop

"We had to deal with three groups of stakeholders," Tino continues: "Employees in Functional Management, Application Management and I&FS (infrastructure). That's a total of around 400 people whose perceptions we're tracking closely, even for a time after the completion of

the project. In my opinion the great thing about this tool is that you can decide for yourself which items to measure. We did that in a workshop with the change agents at the kick-off. Everyone had an opportunity to say what they considered important for the success of this project. Those subjects were translated into 20 or so statements and incorporated in the survey. Statements like: 'I'm convinced that my team will work better as a result of this change', 'I'm enthusiastic about this change' and 'I understand my new responsibilities'. In that way change agents can see that their own criteria have been included.

Baseline measurement

Shortly afterwards we conducted the baseline measurement. Everyone received an e-mail with a link to the survey. The tool translates the survey results into an adoption status for each team. That gave us an insight into each team's perception, so we could define targeted and customised interventions. That was a major benefit. In projects you often hear people voicing vague gut feelings by the coffee machine and you don't know whether they're shared by more people. So there's not much you can do with them. This tool makes those feelings concrete and tangible. The results even give rise to overall recommendations such as 'Don't accept the complaint, but ask what's necessary to resolve it' or 'Celebrate the successes'. That's an enormous help when mapping out actions. In addition, the results are always shared with the teams through the change agents. Openness is very important at MoC. It creates support, including for subsequent projects.

These change agents are actually crucial throughout the MoC process. They are closest to their people and also have

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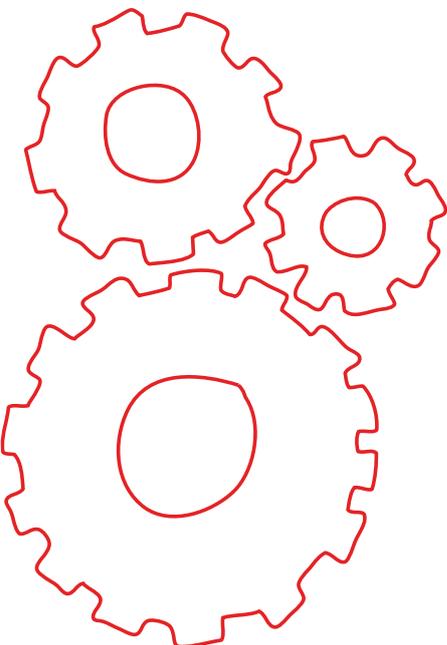
to do something with the results of the measurements. Sometimes that's difficult for them because they have to continue to back the chosen direction while also wanting to stand up for the interests of their people. From a project communication perspective we support them with articles on the intranet, there are training courses, walk-in sessions and we provide information in the team sessions. But the change agents are themselves responsible for their own team, the communication on the results of a measurement and the necessary interventions. In some cases they're friendly and helpful, whereas at other times they really target incorrect behaviour. Because one thing has to be clear: there's no turning back.

Specific intervention after the measurement: Operational Test Environment

The results of the first measurement already revealed that the organisation needed practical experience with the new tool. The measurement clearly showed that in this phase there was mainly a need for the 'what' and less need for the 'how'. In consultation with the change agents this input was translated into a hands-on, operational test environment which we created in order to 'play' with ServiceNow in combination with IT-Guardian. It therefore ran in parallel with the old environment. This gave employees a risk-free means of experiencing how ServiceNow works. And a lot of use was made of it. It was a unique opportunity for Delta Lloyd to try it out and it worked very well."

Interventions

Robert-Jan: "A MoC process like this can only succeed if there's a will on the part of the customer to learn to deal with change. And a change manager who takes the lead helps enormously. Tino knows the people, the culture and the

technology. At Sentensor we handle the sending of the surveys and the analyses of the results. We interpret these in consultation with Tino and then jointly agree interventions. We can see precisely where teams are on the 'change curve' and what they need to take the next step. The change agents and the project team can then target their work very specifically."

Need for change

Tino stresses: "It's very important that people understand the need for the intended change. Otherwise they won't really change their behaviour. So you must emphasise the 'why' and communicate it repeatedly. You often see companies still focusing on the 'can': if we keep them on course, it'll all turn out fine. Forget it. That never works. It means there's no movement. Give people space to do it better themselves. And see their results as a tool not for judgement but for improvement. That's the new way of thinking. MoC contributes to that.

Learning process

Did we gain a lot from it? Certainly, and we're still fully engaged in it. People themselves develop, as I said earlier. Every measurement gives new insights and we try to respond appropriately. It's a learning process and that's something we chose deliberately. For example, we saw a downturn when people started using the tool themselves. We tackled that in a targeted way. You can do something about it. It's important that this tool gives us a total picture of the way in which the change develops among our people. Sometimes it involves a search for the right interventions, of course, but we're very consciously engaged with change and the people. That's where the biggest gain is to be made and it certainly pays off. Because people are our most important capital."
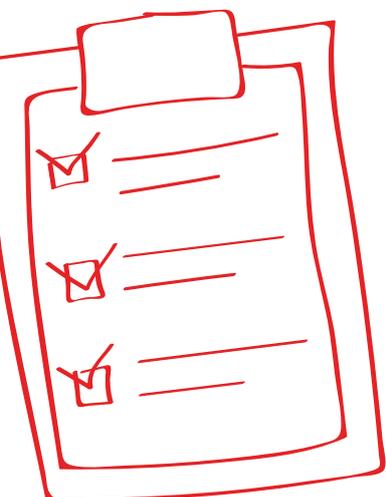
Sentensor's measurements of employees' perceptions in change projects are based on three key concepts: must, want and can.

Must

'Must' concerns the employee's reflection on whether the intended change is really necessary. He often assesses it on the basis of his line manager's conviction and behaviour. If his line manager frowns and says there are other more important priorities, the employee cannot be expected to put a great deal of energy into change.

Want

Want concerns the question of 'what's in it for me?' What added value does this solution give me? By giving the user a long view and moving gradually in the chosen direction, he sees the world changing to his advantage. He will more readily accept minor setbacks and continue to focus on the end-result.

Can

The 'can' concept concerns the question of whether there is sufficient freedom of action in the new solution to do the work and whether people themselves are able to operate within it. Managements often make that assumption too rashly. Even if everyone understands that the change 'must' happen, and is convinced that it is good for their professional development, there may still be a perception that the chosen model does not offer sufficient freedom of action for the work that has to be done. Or the employee believes he simply cannot do it, for example because there's suddenly a requirement to operate on a higher conceptual plane (new competences and RACIs (responsible, accountable, consulting and informed)). Then too the likelihood of your project succeeding falls sharply.

If we set the three concepts out in a list as illustrated below, we see that in practice there are three implementation scenarios that arise time and again:

1. Must scores low – the dying candle: In this scenario people are willing and able to change, but there's no real need or motive. A change from the bottom up that often fails to reach the boardroom and therefore burns out like a candle. No urgency, no focus.
2. Want scores low – flogging a dead horse: The need for change is there, the employees are also able to take it on, but they drag their heels, for example because they just don't believe in it.
3. Can scores low – wishful thinking: There's a clear need, the people want it, but they're unable to achieve the change themselves.
4. Must, want and can score high – Success: The likelihood of success is greatest if the perceptions of need, conviction and skills are right. In other words: experience shows that the likelihood of success is greatest if at least 60% of the people concerned score positively in these three components.

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