# XpertHR Podcast

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| Bar Huberman: | Hello and welcome to this week's XpertHR podcast with me, Bar Huberman. Any HR change, from the introduction of a new policy on flexible working to a change to the performance appraisal process will affect many people, if not everyone in the organisation. To ensure the change is a success, it's essential for the HR team to manage carefully its introduction in the workplace. |
| | I'm joined by Debra Cadman, a consultant with Cadman HR and author of the new XpertHR good practice guide on managing an HR change to discuss how to ensure the success of an HR change. Welcome Debra. |
| Debra Cadman: | Hi Bar. |
| Bar Huberman: | First of all could you explain why we're talking about this? Why is it so important for the HR team to manage carefully an HR change? [0:00:51.5] |
| Debra Cadman: | An HR change is likely to affect many people in the business and it's more likely to be a success if it's carefully planned. It's also very important, given HR's role in business transformation and how involved it is, that HR manages its own change well and credibly. So that's critical to the HR team. |
| | And also it just makes good business sense to plan properly for anything which changes the landscape or affects people. |
| Bar Huberman: | So what's the first thing HR should think about when an HR change has been proposed? [0:01:20.0] |
| Debra Cadman: | I would say examine the business case, understand the purpose of the change and make sure that it will add value. |
| Bar Huberman: | Sometimes a proposal for change will have come from the board, so in that situation is it still important to look at the business case? [0:01:32.7] |
| Debra Cadman: | Yes. Even if a senior person suggests a change, it's important to consider fully because you need to understand the rationale of what you're doing, why you're doing it and the impact it will have, to determine if the change should go ahead. |
| Bar Huberman: | Right. So could you tell us in a bit more detail about some of the factors that you need to consider when looking at the business case? [0:01:50.6] |

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| Debra Cadman: | It's important to ask some key questions when forming the business case, such as why the organisation is considering the change. For example, is it legislative and you can't avoid it? Or is it a change to strategy or policy? What do you want to achieve as a result of the change? What are the implications for the business? What impact will it have on employees and/or managers? What will it cost and is there a return on investment? |
| | If you methodically go through the questions outlined in the guide, then that will help to build a picture of any gaps in the business case and whether those gaps are acceptable or not. |
| Bar Huberman: | Okay, let's move on now. You've examined the business case and you've decided to go ahead with the change. How should you then go about making it happen? [0:02:31.6] |
| Debra Cadman: | Well this is where you have to go into planning mode. It's so important to put a plan into place, to test it with other stakeholders who are either involved in the change or impacted by it. I've seen a great plan put together which had to be changed partway through because no one considered the impact of changing pay strategy on the finance team's budgeting process. |
| | So take time to sit down, create a plan and then test it. That's essential to any success in change. |
| Bar Huberman: | Okay, so HR can't really look at any change in isolation – it really has to consider the impact on the wider organisation. [0:03:04.8] |
| Debra Cadman: | Yes, absolutely. |
| Bar Huberman: | So how should you start your planning process? [0:03:08.1] |
| Debra Cadman: | Well you should always start at the end of your plan. And what I mean is that you need to know when you have to deliver the change and then work backwards so that you can ensure that your target date is feasible. This will help you to consider what the major milestones are that you have to achieve and when you have to achieve them by. |
| | For example, if you were introducing a new performance management system which has to be in place for the appraisal cycle in April, then you need to start at April and work backwards, building in any key activities that need to happen prior to go live, such as systems testing, employee training, manager training, system design etc. |
| Bar Huberman: | Are there any tools that can help you with the planning process? [0:03:46.6] |
| Debra Cadman: | Yes. As part of the good practice guide, there's an example project plan, along with a charter for change. The charter is a document that helps to articulate the problem that the change is aiming to solve, what's in-scope and importantly what's out-of-scope, the proposed change and what it will look like, and also to identify any key stakeholders. This will then assist in managing expectations about what the change is and help to draw up a communications plan, such as who to target, what to target, when to target. |

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| Bar Huberman: | That sounds like it will be the go-to document then for the HR team, listing all the main points which they can then refer to throughout the change process. [0:04:23.6] |
| Debra Cadman: | Yes, and it's important because as projects progress it's easy to forget exactly what you agreed, and therefore you can keep referring back to that document to keep focus. |
| Bar Huberman: | Is there anything else then? Any other tools that can help you with the planning process? [0:04:36.5] |
| Debra Cadman: | Yes. So the project plan, as I mentioned. That helps to give an outline to think through all of the tasks that need to be done in order for the change to be implemented correctly. It's very high-level, but then under each subject you can come up with individual tasks.

It might seem laborious – and I think as an HR person sometimes we avoid doing these things – but it is so important, as it helps to identify any dependencies that may exist between tasks and the time needed to undertake those.

So again, for example, if we use the earlier example around the performance management tool, it may be that you've got to have IT people to support the design of the system but they're all engaged on another project so you can't get them in the right timeframe, so you have to rethink your plan and see if you can still meet the overall deadline. |
| Bar Huberman: | So what are the key points to consider when you're planning an HR change? [0:05:22.5] |
| Debra Cadman: | You obviously need to consider the costs. How much will the change cost and will it return an investment? You need to think about timescales. You need to look at the team, both in terms of roles and responsibilities. And of course communication. |
| Bar Huberman: | Okay, let's break it down. Tell me a bit more about roles and responsibilities. What do you need to think about? [0:05:41.8] |
| Debra Cadman: | You will need to understand who is responsible for delivering what. There's a document in the good practice guide called a RACI, which stands for Responsible, Accountable, Consulted, Informed. On this, you list everyone who's involved or impacted by the change project and what type of role they have. Are they responsible for delivery of the task? Are they accountable for the task? Are they consulted about it or just informed about it? This can then even be broken down into small tasks if it's a large project. |
| Bar Huberman: | Could you tell us about some of the roles, then, that can be useful when affecting an HR change? [0:06:15.5] |
| Debra Cadman: | There are a number of key roles and this is where the RACI document can help. All change projects will need someone to be in charge of the change – a project leader, if you like – who liaises with senior stakeholders, is accountable for the delivery of the project, manages the plan, manages the costs etc. |

You may also need subject matter experts such as IT specialists, pension or payroll specialists, L&D people to help with certain aspects of the change, depending upon the project. If it's a large change you may need individuals that are responsible for individual aspects and maybe even a steering group that oversees the whole change and makes decisions about it.

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| Bar Huberman: | So you might have people from the HR team making up a change management team? [0:06:59.9] |
| Debra Cadman: | Yes. Yes, exactly. You may also need to train people in change, particularly if what they're doing impacts them in any way, or an area that they're responsible for. |
| Bar Huberman: | What kind of training are we talking about here? [0:07:11.5] |
| Debra Cadman: | It can cover a variety of things such as time management, project management skills, but also it may be necessary to help them understand how they feel about the change and how to manage their own behaviours to help coach others through it. |
| Bar Huberman: | You previously mentioned cost is something that you need to consider at the earlier business case stage. [0:07:29.8] |
| Debra Cadman: | Yes. You need to work out costs and this can mean, 'How much will the actually project cost to deliver?', but also, 'Are there any on-going, associated costs?' such as software licences for a new HR system. And then, 'What's the return on investment and will that offset some of the initial costs?' |
| Bar Huberman: | And then again at the planning stage presumably you need to work out more fully your costings for each aspect of the change? [0:07:53.7] |
| Debra Cadman: | Yes, exactly. And track your spend throughout the project to ensure that you are on-budget and stay on-budget. |
| Bar Huberman: | You previously mentioned that communication is a key part of making an HR change. Why is this such an important factor? [0:08:05.4] |
| Debra Cadman: | HR changes are likely to have a significant impact on many people in the organisation and the importance of communication is to ensure buy-in and to overcome resistance or change-weariness. |
| Bar Huberman: | What do you mean by 'change-weariness'? [0:08:07.6] |
| Debra Cadman: | That's a good question. There are so many changes happening in business at the moment, and people are quite cynical about, 'Oh here we go, another change.' So it's important that you're fully transparent about why this change is important, what you're moving away from, what you're moving towards, and really thinking about the differences that this change will bring and constantly communicating the same message. |
| Bar Huberman: | Debra, could you give us your top three tips when thinking about communicating an HR change? [0:08:44.7] |

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| Debra Cadman: | I would say firstly don't think you can over-communicate. Neuroscience tells us that change is effectively seen as a threat by people. It's not that we can't adapt. Humans are brilliant at adapting and evolving. But when somebody is having a change at work, they feel threatened by it and therefore they stop hearing what's being said. So just keep reiterating the same messages and make sure that you keep people engaged throughout the change. |
| Bar Huberman: | And what's your second top tip? [0:09:11.8] |
| Debra Cadman: | You need to plan the communication. It needs to be a fundamental part of the project plan and each milestone should have a communication associated with it. Even if there is no progress, you should still communicate and tell people why there's no progress. |
| Bar Huberman: | Okay. And your final top tip? [0:09:27.4] |
| Debra Cadman: | Think about different ways of communicating. People have different preferences, just like they have different learning styles, so it's important to use a range of tools to get the messages out there. And don't be afraid of trying something different. |
| Bar Huberman: | Okay, well I think that's a good note to end on. For more information on this subject have a look at our good practice guide on managing an HR change, which you can find under the Good Practice Manual tool – just click on the Change Management category. |
| | That brings us to the end of this week's podcast, which you've been listening to with me, Bar Huberman. We're back next Friday but until then it's goodbye from us. |