



Change management is often seen as a step in the ladder of success but in fact, it is THE ladder of success.

Agenda



- Defining Success
- Problem Identification
- Break the Old
- Change Management Challenges
- Scope Creep
- Business Use Cases (aka Scripts)
- Communication



- Defining Success
- Problem Identification
- Breaking the Old
- Change Management Challenges
- Scope Creep
- Business Cases
- Communication

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How do you feel about your current LMS?


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How do you feel about your current LMS? (single-choice)

- Love it!
- It's ok
- Meh...
- I want to boot it into the sun
- We don't have one

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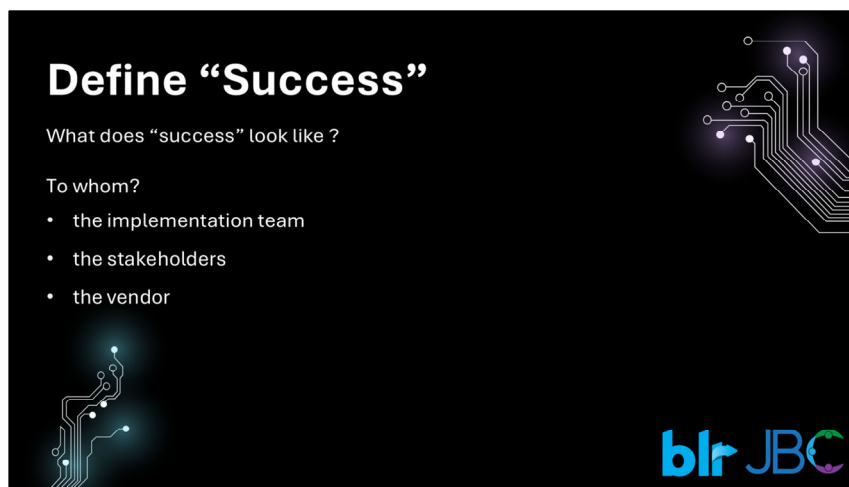


What does "success" look like?

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What does "success" look like? (word cloud)

- Better metrics
- Faster implementation
- Better learner outcomes
- Etc.



Define “success”

- What problem are you trying to solve? What is the problem? Is there a problem?
- Who gets to define the “problem”? Is the problem “real”? Is a new LMS really necessary?
- Where is the needs analysis? When was it completed & who did it?
 - Simply hating your current LMS is not a reason to replace it – that’s not a “problem” because everyone hates their LMS!
- Success is not just about the technology - It’s about achieving organizational or educational goals more effectively.
 - Improved learner engagement and outcomes.
 - Enhanced productivity or efficiency in business processes.
 - Positive user experience and feedback from stakeholders.
 - Smooth integration into existing workflows.
 - Insert your use cases here!
- Does “success” look the same to everyone? like to...
 - the implementation team
 - the stakeholders
 - the vendor
 - IT
- Does everyone agree? If not... STOP! Unless everyone agrees on the end goal and HOW to measure success – you will NEVER achieve success without agreement!
- Long-Term Vision: Adoption is successful when new technology is not only used but embraced as a vital tool that enhances performance.

Speaking of Timelines...

What does “success” look like

- In the short-term?
- In the mid-term?
- In the long term?



What’s the definition of “long-term”?



- What does “success” look like
 - In the short-term?
 - In the mid-term?
 - In the long term?
- What’s the definition of “long-term”?
 - Two years?
 - Five years?
 - 10 years?
- Does everyone agree*? If not... STOP!
- * Perfect alignment/agreement is not necessary – just need to be on the same page.
- How do the long-term needs align with IT and their technology stack plans?
- Unless everyone agrees – you will NEVER achieve success!

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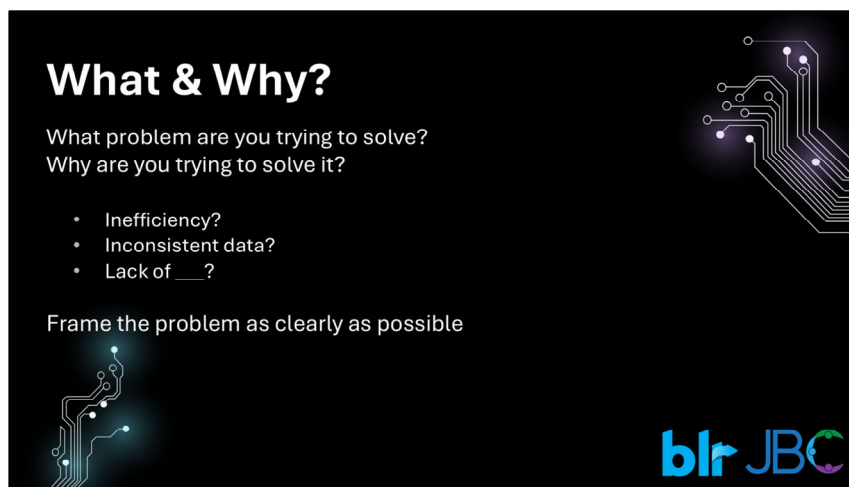


Are you looking to purchase/replace your LMS...

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Are you looking to purchase/replace your LMS... (single answer)

- Just browsing
- Sometime in the near future
- Sometime in the next 1-2 years
- Good grief, NO!





What Problem Are You Trying to Solve?

- Often, technology is adopted without a clear understanding of the problem it's meant to address.
- Why are you trying to solve it?
- Are there better groups/departments with the expertise to do this (or to assist)?
- Questions to Ask:
 - Is there an actual problem with the current system? What is it? Who says so?
 - Inefficiency?
 - Inconsistent data?
 - Lack of ____?
 - Are you solving a problem or adopting tech for its novelty?
- Typical Problems:
 - Inefficiency in training or development processes.
 - Difficulty engaging learners or employees.
 - Lack of personalized learning experiences.
- Framing the Problem Clearly helps ensure that technology adoption is purposeful and goal-oriented.

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Why do people resist change?

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Why Do People Resist Change? (word cloud)

- Fear of increased workload or losing their jobs to automation.
- Cultural attachment to traditional methods of teaching, training, or working.
- Skepticism about the effectiveness of new technologies.
- Lack of stakeholder involvement or insufficient communication.

Change Management Challenges

Why Do People Resist Change?

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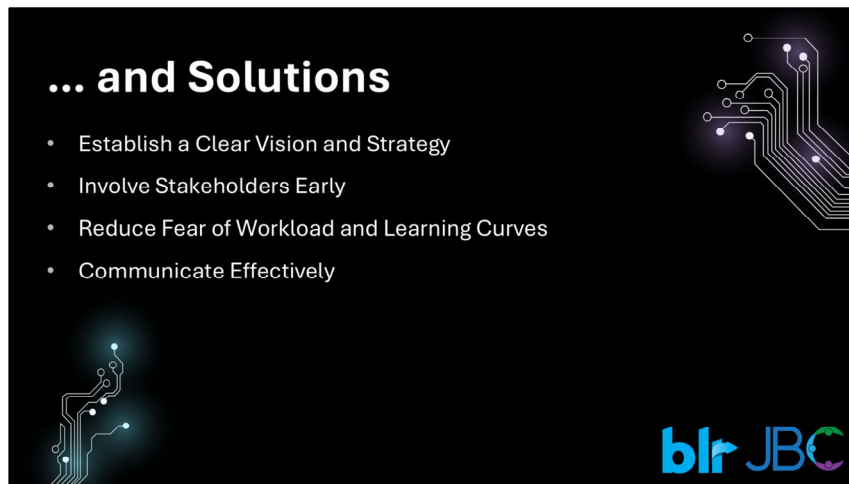
Challenges of Adoption...

- Lack of Clear Vision and Strategy
- Failure to Involve Stakeholders Early
- Fear of Learning Curves and Additional Workload
- Insufficient Communication
- Cultural Resistance
- Lack of Immediate Results
- Weak Leadership Support



Main Challenges:

- Lack of Clear Vision and Strategy
- Failure to Involve Stakeholders Early
- Fear of Learning Curves and Additional Workload
- Insufficient Communication
- Cultural Resistance
- Lack of Immediate Results
- Weak Leadership Support



Establish a Clear Vision and Strategy

- Define how the new technology aligns with overall goals and objectives.
- Create a roadmap for its implementation and benefits.

Involve Stakeholders Early

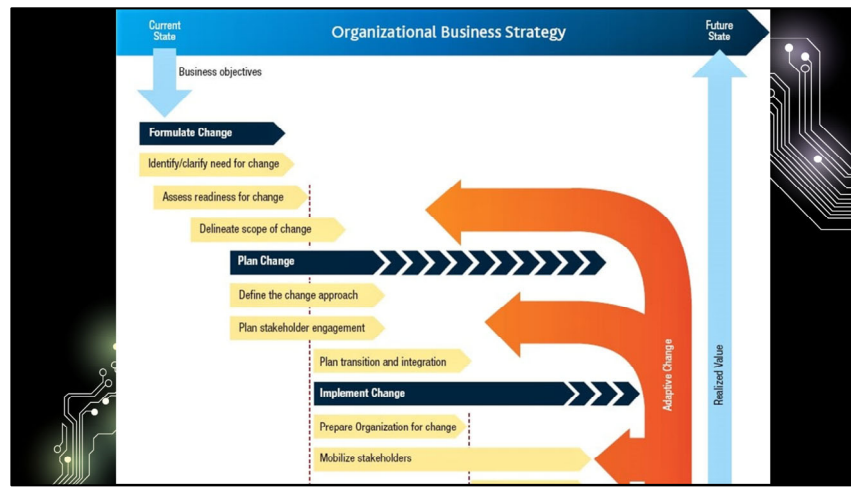
- Engage users and key decision-makers in the selection and pilot phases.
- Foster a sense of ownership by allowing them to shape the integration process.

Reduce Fear of Workload and Learning Curves

- Offer comprehensive training and ongoing support.
- Introduce new tools in a phased manner to minimize disruption.

Communicate Effectively



- Ensure frequent, clear, and consistent communication about the benefits, timelines, and expectations.
- Use feedback loops to adjust strategies as needed.



According to the PMI Project Lifecycle, Change Management is integrated throughout the entire project lifecycle, but it is most prominently present in the "Planning" and "Monitoring and Controlling" phases as this is where the formal change management process is defined, implemented, and monitored to manage any project deviations from the initial plan.

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What does it mean to "break the old"?

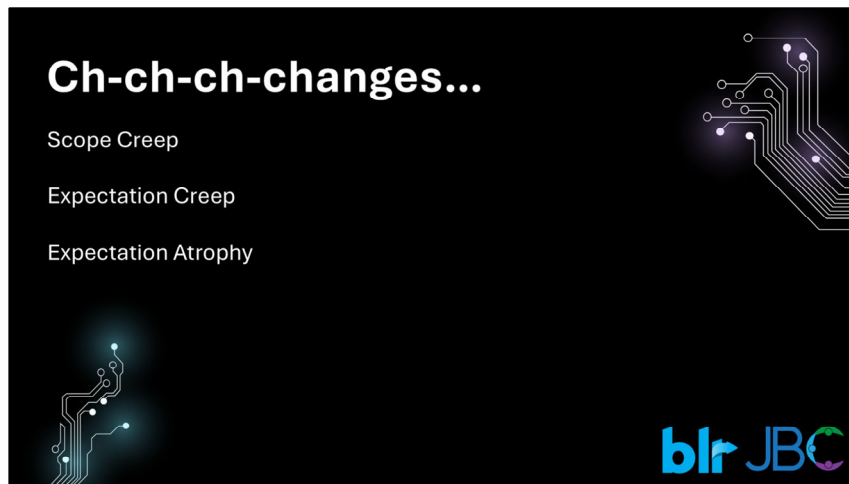
① Start presenting to display the poll results on this slide.

What does it mean to “break the old”? (word cloud)

- Let go of the established (method, process, procedure, etc.)
- Disruption
- Innovation
- Irrelevant
- Transformation
- Overhaul
- Evolution
- Renewal
- Reinvention



- Challenging traditional methods
 - Overcoming resistance to change
 - Reevaluating organizational culture
 - Abandoning legacy systems
 - Foster innovation and experimentation
-
- Willingness to Break with Tradition
 - Emerging technologies challenge entrenched traditions in education and business.
 - The mindset shift: Seeing technology as an enhancement, not a replacement, to the human experience.
-
- Overcoming Cultural Resistance:
 - Align technology with the core values of the organization or institution.
 - Demonstrate how it adds value to existing processes and improves outcomes.
-
- Example: Using virtual reality (VR) to create immersive learning environments without losing the human connection of face-to-face interactions.



What Is Scope Creep?

- Scope creep occurs when the goals of the technology adoption project expand beyond the original objectives, often due to the addition of unplanned features or changes in vision.
- Scope Creep happens
- Must have a process in place BEFORE you ever select a vendor
- Must make the vendor part of the gatekeeping effort to avoid scope creep

How to Manage Scope Creep:

- Clearly define the scope of the project from the outset.
- Implement a process for evaluating and approving any changes to the project.
- Regularly revisit the project goals to ensure alignment with the original plan.

Expectation creep



- refers to the gradual and often unspoken increase in expectations beyond the original scope of a project or task.
- It occurs when stakeholders, clients, or team members start to anticipate more deliverables, higher performance, or additional features without formally adjusting the project's objectives, timeline, or resources.
- Expectation creep is more about the rising expectations of quality, complexity, or outcomes, often without clear communication or agreements.
- it's a shift in what people expect over time, often leading to dissatisfaction if those unspoken expectations are not met.

Expectation atrophy

- refers to the gradual decline or weakening of expectations over time. This happens when initial high expectations for a project, product, or outcome diminish due to delays, setbacks, poor communication, or unmet goals.
- As stakeholders or team members experience repeated disappointments or failures to meet initial promises, their confidence or belief in the success of the initiative diminishes, leading to lower engagement, reduced effort, or lack of enthusiasm.
- In essence, expectation atrophy occurs when optimism fades, and expectations weaken as a result of prolonged underperformance or unaddressed issues.

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What can you use business use cases (scripts) for?

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What can you use your use cases for? (multiple options)

- RFPs
- Sales Demos
- Change Management
- Communications
- QA/QC testing
- UAT testing
- Training outline
- User adoption communications
- Hands-on training exercises

Duck, duck, ...GOOSE!

When to collect use cases - ALWAYS!

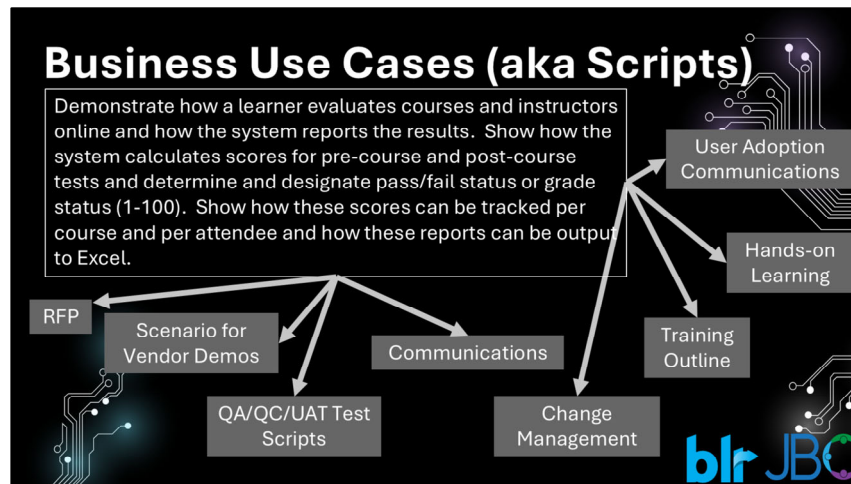
Flip those use cases from the demo into...

- Change management & communications
- QA/QC & UAT test scripts
- Training outline & materials
- Hands-on training



How to change the duck into a goose!

- Take your existing use cases and turn them into test cases
- Collect as many use cases as you can before you talk to vendors
- Use those use cases as a way to narrow the choices down
- Make the vendor(s) walk you through a demo of those test cases (do NOT let them “talk” you through it – make them SHOW you)
- Flip those use cases into test scripts
- Flip those test scripts into your training outline
- Bench Strength - When it comes to testing... you can never have enough testers!
- Ex LMS implantation started with 70 testers
 - Ended up with 30 for week 1
 - Ended up with 12 for week 2
 - Ran 847 unique formal test cases
 - Ran 133 unique informal test cases
- Difference between formal and informal test cases
- Testing and Feedback Loops:
- Pilot programs can help refine implementation strategies and gather critical feedback.
- Allow space for failure and iteration—early testing reveals potential issues before a full-scale rollout.
- Iterative Approach to Adoption:
- Implement changes in phases rather than all at once.
- Use data from pilots and user feedback to continuously improve the technology’s effectiveness.



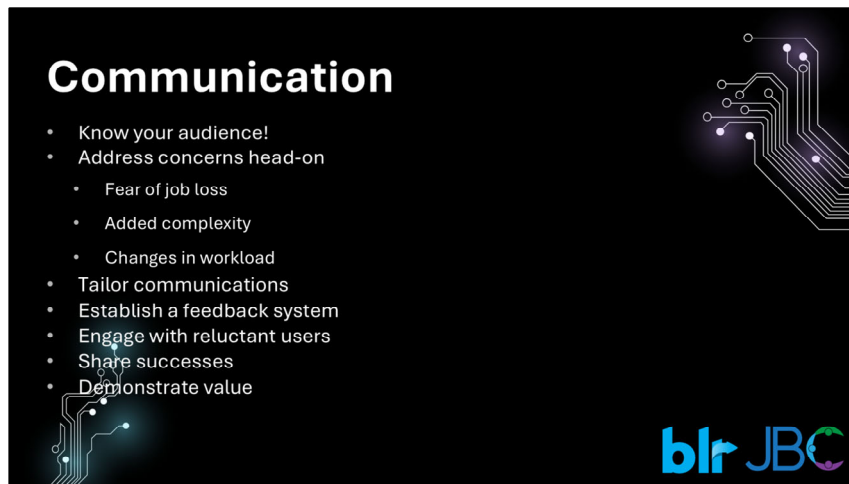
- Write your Business Use Cases (aka Scripts)
- Get Agreement
- Re-use those “use cases” to make the vendor SHOW YOU how their system can handle that use case
- Reminder: YOU and your company are the BUYER, if the vendor can't/won't SHOW you how their system can do what you need it to do, move on. YOU are the driver, not them.
- Then re-use those use cases:
 - In all Change Management conversations
 - As examples of future functionality in your on-going communications (throughout the entire project)
 - As the foundation of your test scripts for QA/QC and UAT testing
 - To build your training outline
 - As a checklist for all training materials (manuals, job aids, help files, etc.)
 - To build hands-on training exercises

Sample

Use Case Test #0097: Add a New Vendor

- Log in as an Admin (see list of user IDs)
- Navigate to **Classroom Training> Vendors and Instructors**
- Click **Add a New Vendor**
- In the **Vendor Name** box type "**TEST-(your login name)**"
- OPTIONAL: If you have other information to add, do so
- Click **Submit**
- Verify your test vendor is listed
- Log out





Know your audience!!

- C-Suite
 - Managers
 - Vendors
 - Contractors
 - Specific departments/employees
-
- Effective Communication throughout the Change Process
 - Address concerns head-on: Fear of job loss, complexity, and workload increases
 - Tailor communication to different audiences (executives, employees, educators)
 - Establish a feedback system to ensure concerns are addressed in real time
-
- Overcoming Resistance through Engagement
 - Bring resistant users into the conversation early
 - Use stories of successful pilots or case studies to demonstrate real value



What problem were you trying to solve?

- How do you prove success? Success Metrics
- User Adoption Rates: Are people actually using the technology, and are they using it effectively?
- Impact on Learning and Performance: Is the technology improving learning outcomes, efficiency, or productivity?
- Return on Investment (ROI): Is the org seeing measurable benefits from its investment in technology?
- User Satisfaction: Are stakeholders satisfied with the new tools, and do they see it as adding value?

Tangible vs Intangible benefits?

- Non-quantifiable, yet valuable outcomes that may not immediately show up in metrics but significantly contribute to an organization's overall success.
- These benefits often enhance the culture, environment, and capabilities of an organization:
- Increased Employee Engagement and Morale - New technology, when effectively implemented, can lead to greater engagement by making tasks more efficient, exciting, or meaningful. Employees may feel empowered with improved tools that allow them to work smarter, not harder, leading to enhanced job satisfaction and morale.
- Enhanced Innovation and Creativity
- Improved Collaboration and Communication
- Strengthened Organizational
- Positive Organizational Culture Shift
- Enhanced Knowledge Sharing and Retention
- Improved Customer and Stakeholder Perception

- Increased Employee Retention
- Future-Proofing the Organization



- Successful technology adoption is about more than just rolling out new tools—it's about thoughtful planning, stakeholder engagement, and effective communication.
- Defining success early and managing challenges like resistance, scope creep, and testing will help ensure a smoother transition.
- Breaking with tradition requires a cultural shift, but when managed properly, it can unlock new opportunities for learning and development.
- HANDOUTS – a quick checklist to help keep you on track for success!

Your Presenters



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