



# How to manage change successfully

The journey to 'good digitisation' for your practice and your clients



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Change is happening all around us. The digitisation of the accounting and bookkeeping industry is here, but it doesn't have to be as intimidating as it sounds.

Change can be scary, and as a result 'bad digitisation' can take over. Implementing a variety of new systems, tools and processes as patch fixes or quick wins can lead to systems being poorly integrated or worse – not working with each other at all.

Good digitisation relies on implementing robust, smart and efficient solutions to manage your practice. Fully curated and integrated workflows provide the stability and scale to grow your business by taking care of the administration and management of your day-to-day processes, leaving you to focus on the important things: your clients.

Let's look at how change can be good, easy and effective.





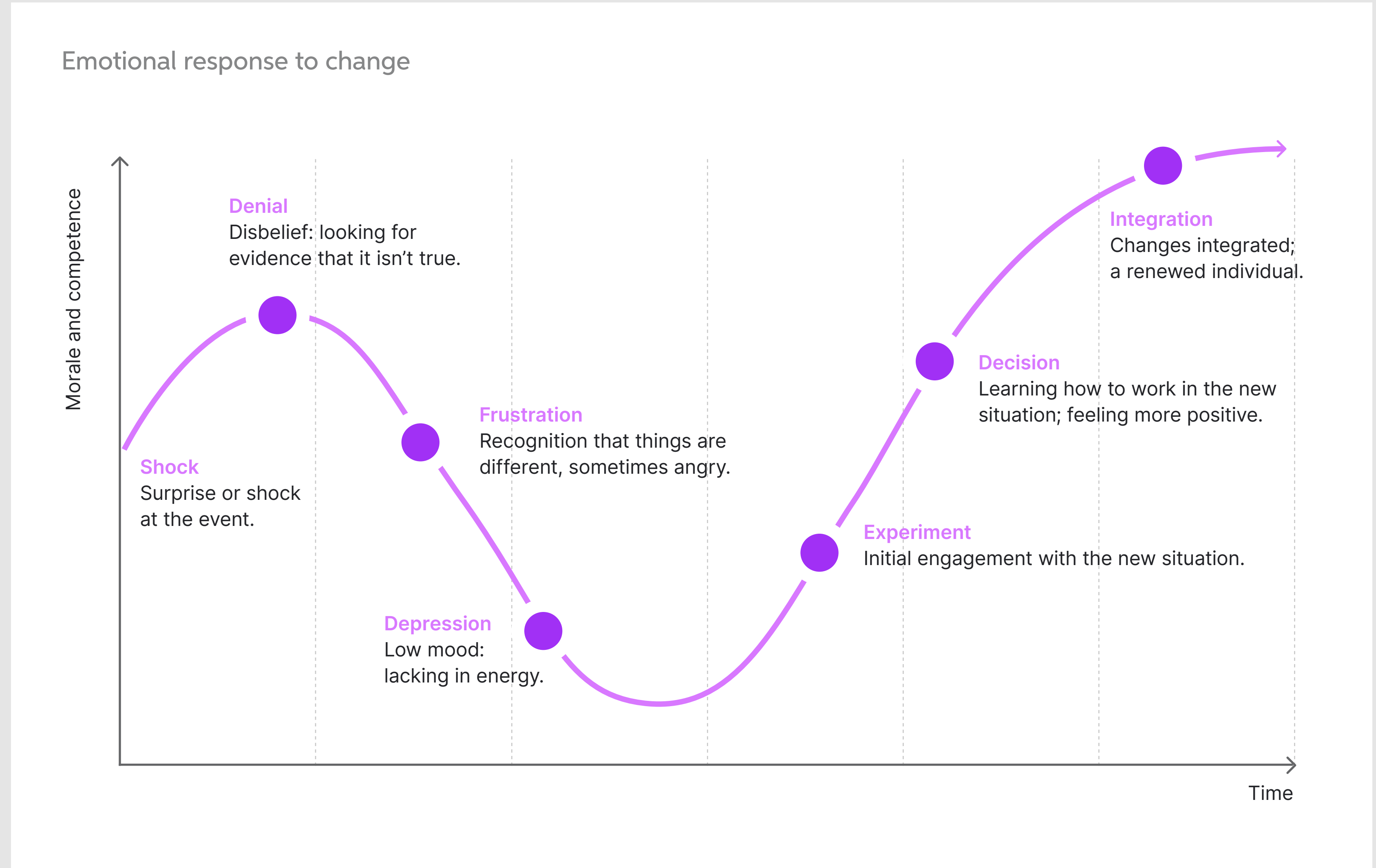
## Understanding Change

Sometimes we're forced into change. The Covid-19 pandemic sent the world into a prolonged state of flux, and digitisation was sped up to adapt to the new ways of working.

Those who didn't recognise the need to adapt were left behind, and those who embraced reasonable change saw the pandemic as an opportunity to thrive and develop their practice.

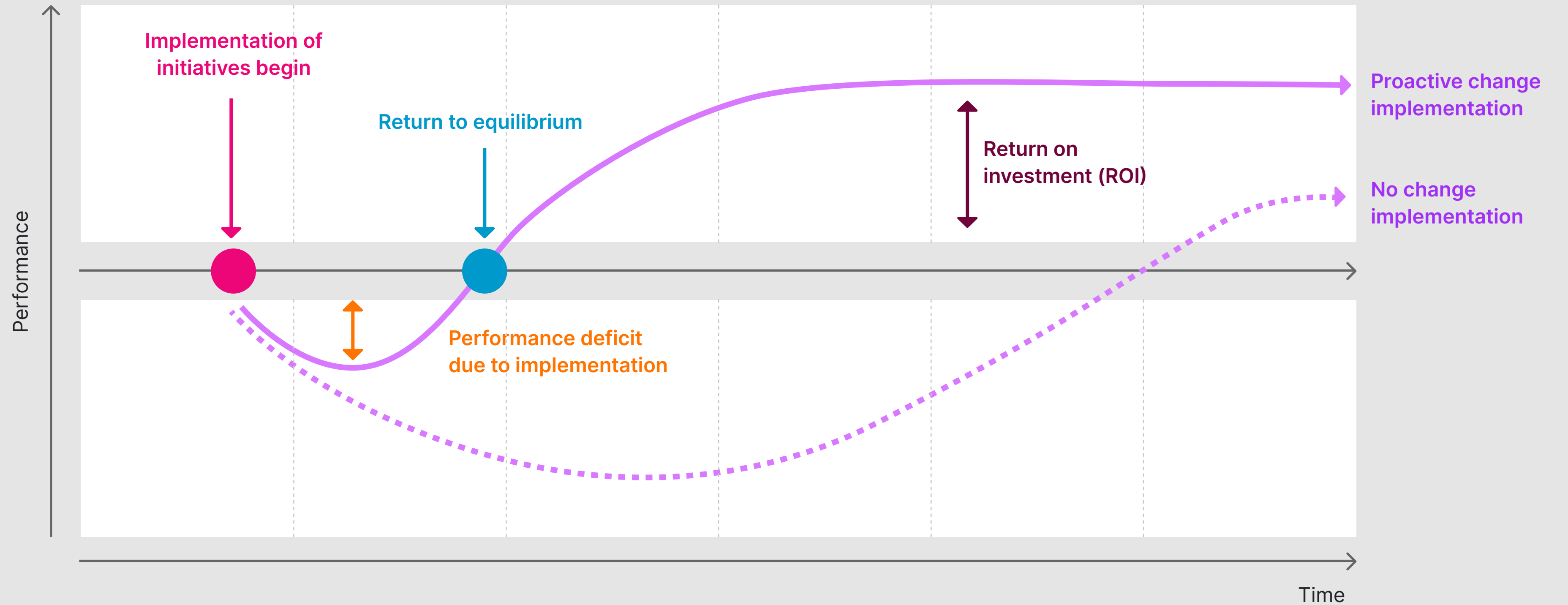
<b>Change is a process</b>	Moving out of a current state and transitioning to a future state
<b>Change starts from the outside</b>	Nearly all change is a response to an external driver - customers; competitors or market conditions
<b>Risk of not changing</b>	Customer dissatisfaction; declining market share and poor financial performance
<b>You have a role</b>	Everyone of us has a choice as to whether we say the same of change

# Individuals accept and adapt to change in their own time



# Helping people through the transition increases ROI - speed of adoption; utilization and proficiency

Change can have a great effect on your bottom line as well. Refusing to adapt or implement good digitisation practices can impact your business' revenue through lost productivity and performance.



# So, how can you approach change at your business so that it's successful and effective?

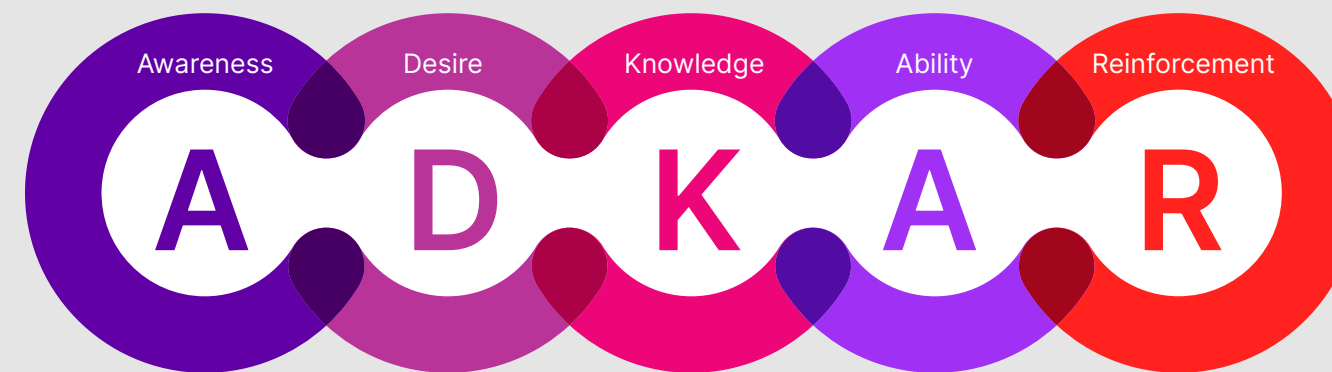
Your role as a leader is to understand *what* clients or employees need to successfully change and *how* to help them do that.

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## What individuals need to change

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Prosci® ADKAR® model outlines what **individuals** need to experience in order to change successfully.



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## How to help them through change

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The MYOB change model outlines the **steps** and **actions** to take to support numerous individuals that are impacted by a change.



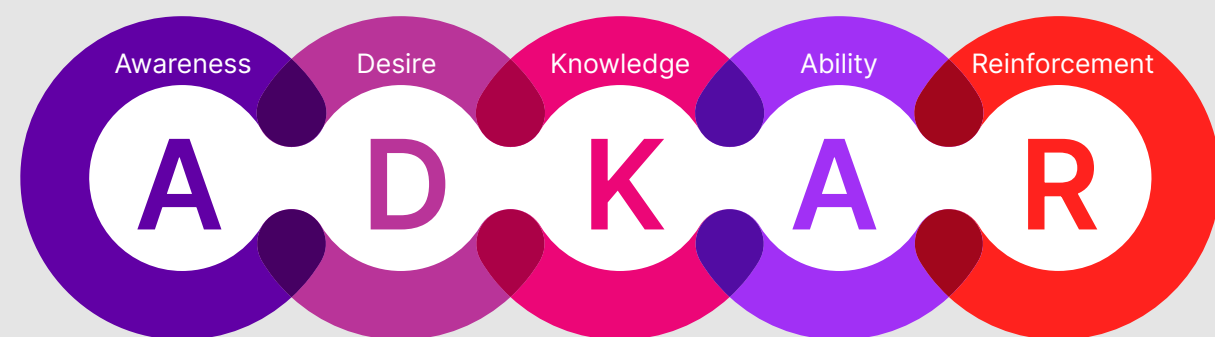
# What's needed in order to change?

As a leader, it's important that you are driving the *awareness* and *desire* for change across your business, or within your client businesses.

You can help equip them with *knowledge* and *ability* to execute, and then nurture their success through *reinforcement*.

It's important to acknowledge guiding people through change will be difficult at times. The process map on the next page can help in developing a robust methodology for implementing change:

<b>Awareness</b> of the need for change	<b>Desire</b> to support the change	<b>Knowledge</b> on how to change	<b>Ability</b> to implement the change	<b>Reinforcement</b> to sustain the change
<ul style="list-style-type: none"> <li>• What is the nature of the change?</li> <li>• Why is the change happening?</li> <li>• What is the risk of not changing?</li> </ul>	<ul style="list-style-type: none"> <li>• Personal motivation to support the change</li> <li>• Organisational drivers to support the change</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge, skills and behaviours required during and after the change</li> <li>• Understand how to change</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrated ability to implement the change</li> <li>• Barriers that may inhibit implementing the change</li> </ul>	<ul style="list-style-type: none"> <li>• Mechanisms to keep the change in place</li> <li>• Recognition, rewards, incentives, successes</li> </ul>





# PLAN: Change ‘levers’ you can apply to guide people through change

Your change plans will depend on the outcome of your assessments conducted during the Assess stage (see next page). Develop a series of activities to complete that will guide people move through the change.

Depending upon the outcomes of your ADKAR® survey you can:

Awareness	Desire	Knowledge	Ability	Reinforcement
Coaching				
Sponsorship	Sponsorship			Sponsorship
	Resistance Management			
Communication				Communication
		Training		

# How to implement change: MYOB's approach to successful change management

Assessing the change required and ensuring you understand what the changes mean for the business is crucial. Planning the execution is almost as important as the implementation itself, as without proper preparation the business runs the risk of falling into 'bad digitisation' habits.

Reviewing and trialling new changes is key to the sustained success of newly implemented changes.



## Access

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- Understand the detail of what is changing and the solution proposed
- Understand what the change means for key stakeholders: current state, future situation and the resulting gaps
- Identify and understand any challenges and barriers to changing
- Understand how ready people are to undergo a change.

## Sustain

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- Review and measure the success of the change
- Gather feedback and capturing lessons learnt
- Analyse
- Take corrective actions to address.

## Plan

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- Identify activities that need to be completed to implement the change
- Develop a strategy and make plans to effectively manage the change:
  - Communications
  - Training
  - Sponsorship
  - Coaching
  - Resistance management.

## Do

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- Take action and implement activities to assist people in their transition to the new way
- Train the people and put in place the new ways of working.

## Embracing change for the better

Change doesn't have to be overwhelming. With careful assessment and planning, the implementation can be smooth and successful.

It's important to understand your business and client needs when it comes to digital change, and to manage the expectation around the roll-out.

The best way to influence change is to model it, so use this guide to help you approach change management in a successful and positive way, so you can spend more time on what matters.



# Templates for your business

Use these handy templates for your business' change management process and ensure you're implementing change successfully



# Assess tool: The 5Ps

Use the following tool when working with stakeholders to identify what is changing and for whom.

Instructions: In conjunction with the project team, identify the project name, purpose, particulars, people impacted and the payoff.

Project name	Purpose	Particulars	People
Identify the project	Identify the purpose	Identify the particulars	Identify the people
	What are the goals or outcomes that the project is trying to achieve?	What will be changing? (e.g. business processes, systems, tools, job roles, organisational structures)	Who in the organisation will have to change how they work?
<b>Payoffs</b>			
What will the project achieve?			

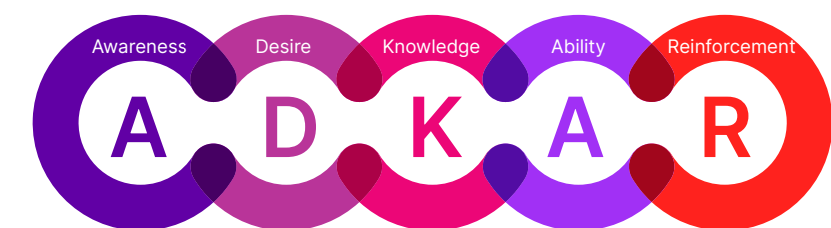
# Change impact

The purpose of this assessment is for you to understand the impact of the impact.

What is changing		When is it changing	
Who is affected?			
Identify who has to change		What's working for/ against the change?	
How are they affected?			
Identify what's changing	The old way of doing things		The new way of doing things
Processes			
Systems			
Tools			
Job role			
Critical behaviours			
Mindset/ attitude/ beliefs			
Reporting structure			
Performance			

# Plan tool: Change plan on a page

Use this template to plan activities for small changes you are going to implement to ensure all elements of change have been addressed.



	Awareness of the need for change	Desire to support and participate in the change	Knowledge of how to change	Ability to implement the required skills and behaviours	Reinforcement to sustain the change
Coaching					
Sponsorship					
Resistance management					
Communication					
Training					

# ADKAR® rating

On a scale of 1 (none) to 5 (complete), rate the ADKAR® elements for the change. If an element has a score of 3 or below, focus your initial plans on that element. To assist with your understanding of the change, answering the questions for each element to the best of your knowledge.

Use slide 3 to develop a quick 'Plan on page' to ensure the change is implemented consistently and that ADKAR® is achieved.

Awareness of the need for change	Desire to support and participate in the change	Knowledge of how to change	Ability to implement the required skills and behaviours	Reinforcement to sustain the change
ADKAR® score (for each element/ scale of 1 - 5)				
ADKAR® score (for each element/ scale of 1 - 5)				
What is changing? (product, process, technology etc)	How will the change benefit team members? (remember WIIFM!)	What new knowledge will be required?	What needs to happen so they feel they have the ability to put the skills and knowledge into practice for the change?	What mechanisms could be implemented or removed to keep the change in place?
Why is this change happening? (logic, emotion, visual & story)	What are the biggest benefits of the change for our customers?	What new skills will need to be learnt?	What barriers exist that may impact implementing the change?	How am I going to recognise, reward, incentivise successes?
If we don't change, what will happen?	What organisational reasons for the change will support desire? (e.g. the competitor)	What new behaviours will need to be adopted?		





**Australia**

1300 555 117  
[myob.com/au](https://myob.com/au)

**New Zealand**

0800 696 227  
[myob.com/nz](https://myob.com/nz)

