

FUTURE_{of}
FIELD SERVICE



A POCKET
SIZE GUIDE TO

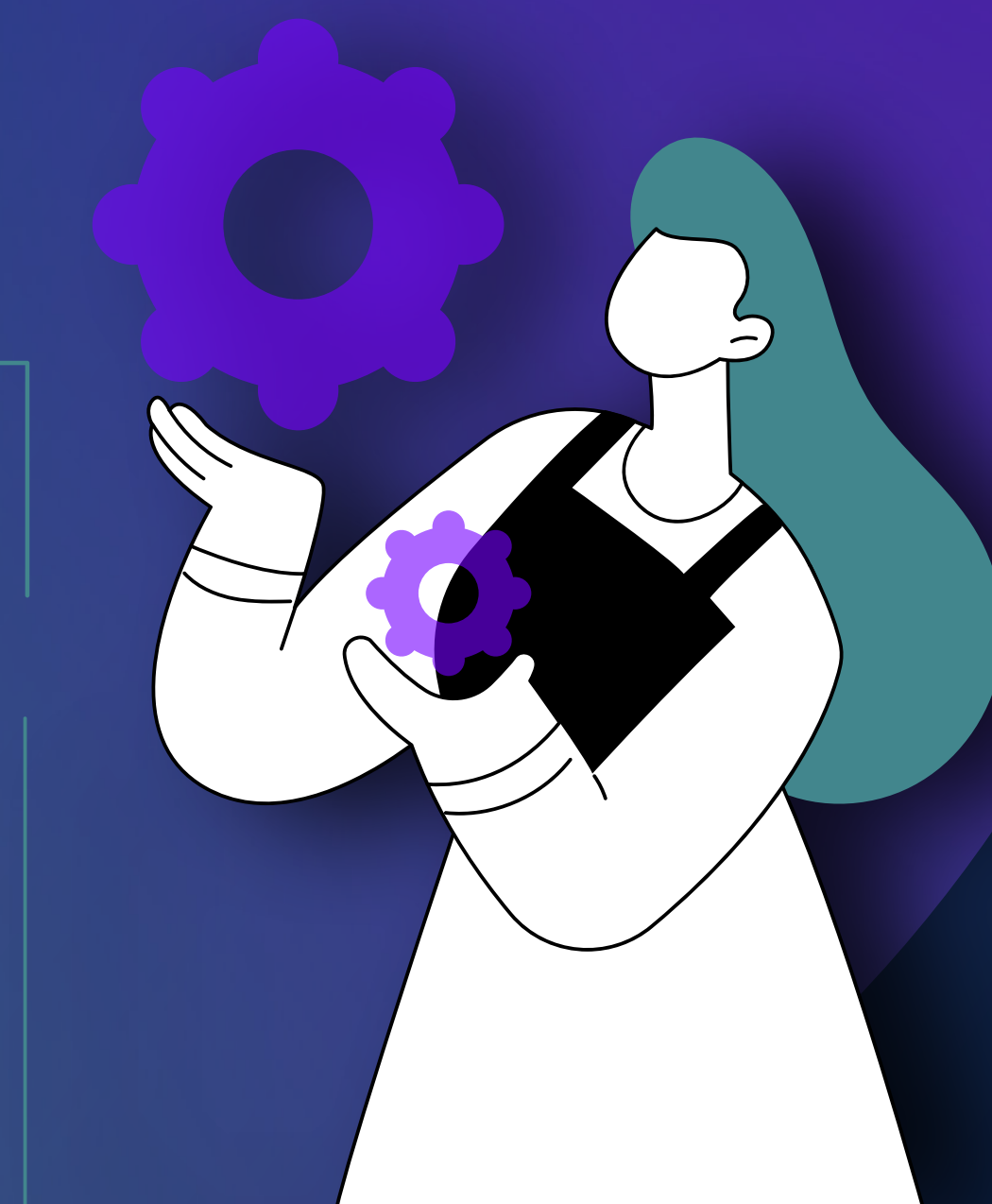
Change Management

During Service Transformation



START

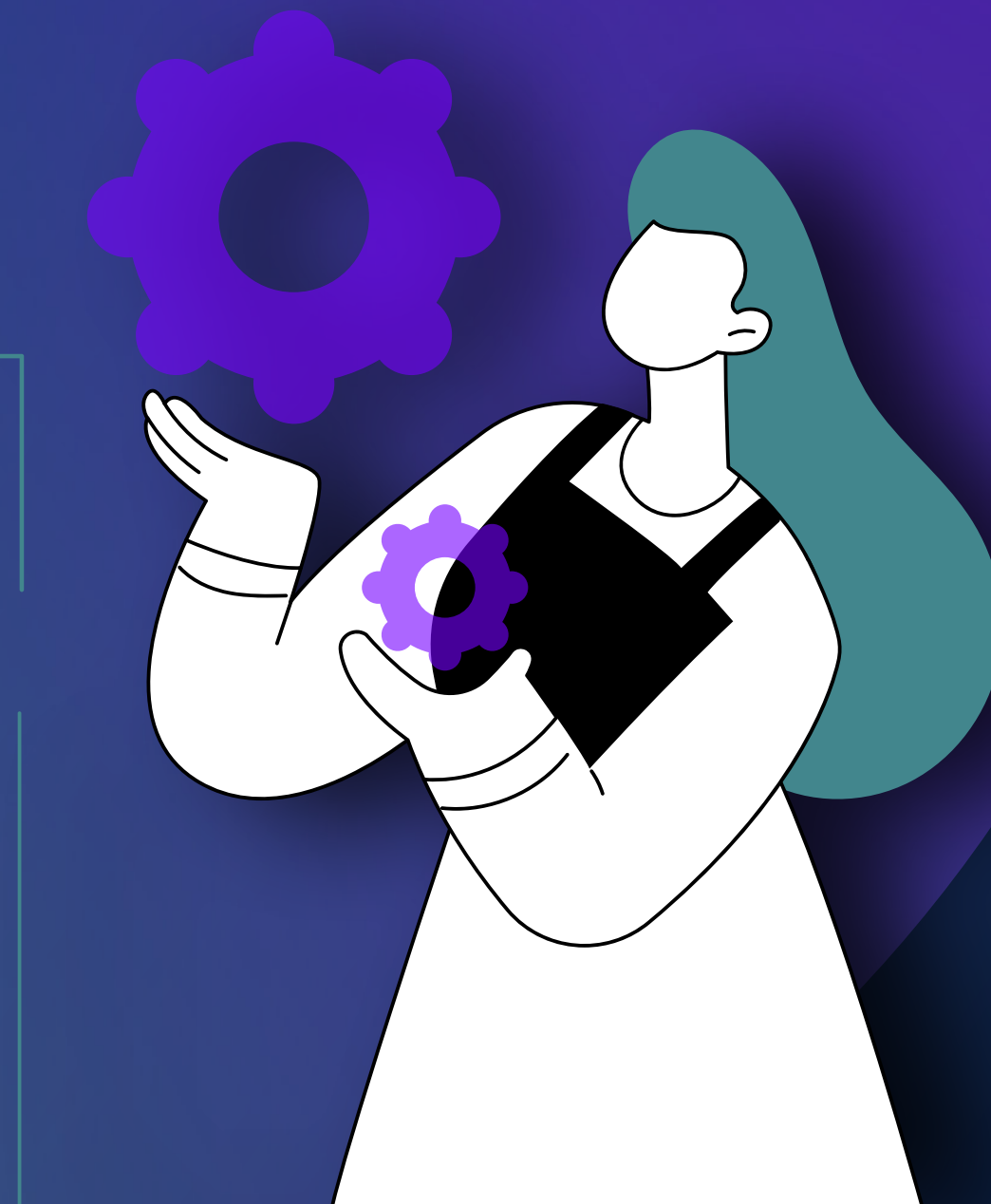
Not Just a Buzzword



Change is constant and accelerating at most companies, particularly when it comes to service transformation and the rapid evolution of technology. It can be hard to keep up, and overwhelming to both team members and leaders alike.



Not Just a Buzzword



There is a gap that exists between the “talk” around the importance of change management and the “walk” into getting it right, as businesses do not truly understand the importance of prioritizing change management as a part of an ongoing business strategy. That’s where this bitesize guide can help.

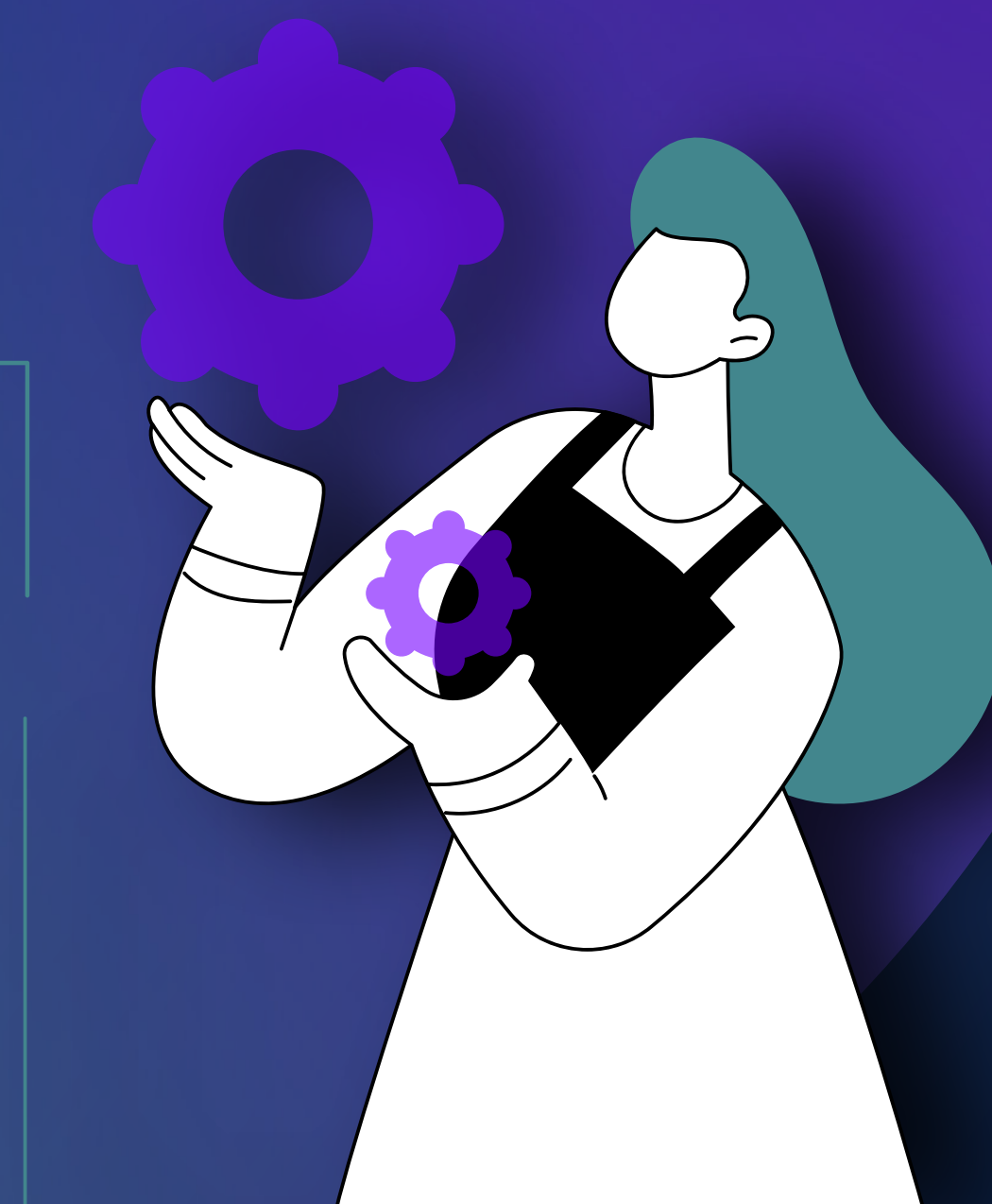
The key is to see change as a continuous and inevitable part of the business, not just a single moment in time, and to be successful in this, companies have to become proactive, versus reactive to change. You may have planned or known of a change in your service management solution for a long time, but even if it’s the right step forward and the right solution, it won’t succeed if you haven’t got the management strategy right from the get-go, and getting it wrong can cost your business time, money and resource.



Not Just a Buzzword



Over the new few pages, we'll summarise why change management in service transformation initiatives fail and how you can succeed, leaving you with ideas and best practices from businesses such as Konica Minolta, Schneider Electric, Tetra Pak and McKinstry Co, who have been there, done it, and most importantly – have learned from it.



Preparing for Change

- **Establish Your Journey**

- ○ ○ Make Your Own Path

Any field service management implementation needs to build on, and enhance, an existing situation, because of this and other variables - **Field Service Management** software is some of the most complex IT solutions you can implement in your business.

To begin your journey, you need to ask yourself honestly...

- What is the business situation in your organization?
- Are you a consolidated, stable business, or undergoing major transformations?
- What is your organizational experience with change?



Preparing for Change

○ Establish Your Journey

● ○ ○ **Make Your Own Path**

The answers to these questions are different for everyone no one starts from the same place or wants the same outcome. But as Tim Baines, Executive Director from The Advanced Services Group states, “focus on business transformation, and change management will follow”. This is vital to consider at the beginning of your process, as Tim explains, this thinking is a state of coalition that helps you “find your story and your personal movement. Doing so sets your foundation, and from there use storytelling to cascade the message far and wide”.

[Hear more from Tim Baines](#)



Preparing for Change

- Establish Your Journey
- ● ○ **Make Your Own Path**

To design your optimal change management journey, it is necessary to have a clear common understanding of the destination as this will significantly influence the decisions you make along the way...

Change energy is limited, and an organization can easily become fatigued. This limits the benefits you may get, so you need to use this change energy as a commodity – and use it wisely.



Preparing for Change

- Establish Your Journey
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Questions to Ask Yourself

Thoughts to Consider

Are you clear about why you're doing this?

Standardization, data transparency, efficiency, and customer satisfaction

Are you looking to adapt your business to the optimal way of working, or do you expect to keep working in the same way with a new toolset?

Will doing this the same way with a different toll achieve the benefits you want?

Are you clear on what metrics you want to improve?

Do you have baselines for the current state, and realistic targets for the future state?

Which are the most important metrics for you to measure success by?

Productivity, customer satisfaction, employee satisfaction?



Why Does Change Management Fail?

- **Introduction**

- ○ You Have Change Fatigue
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- ○ ○ You Haven't Considered the Impact
 - ○ You're Not Communicating Effectively
- ○ ○ You're Not Being Transparent

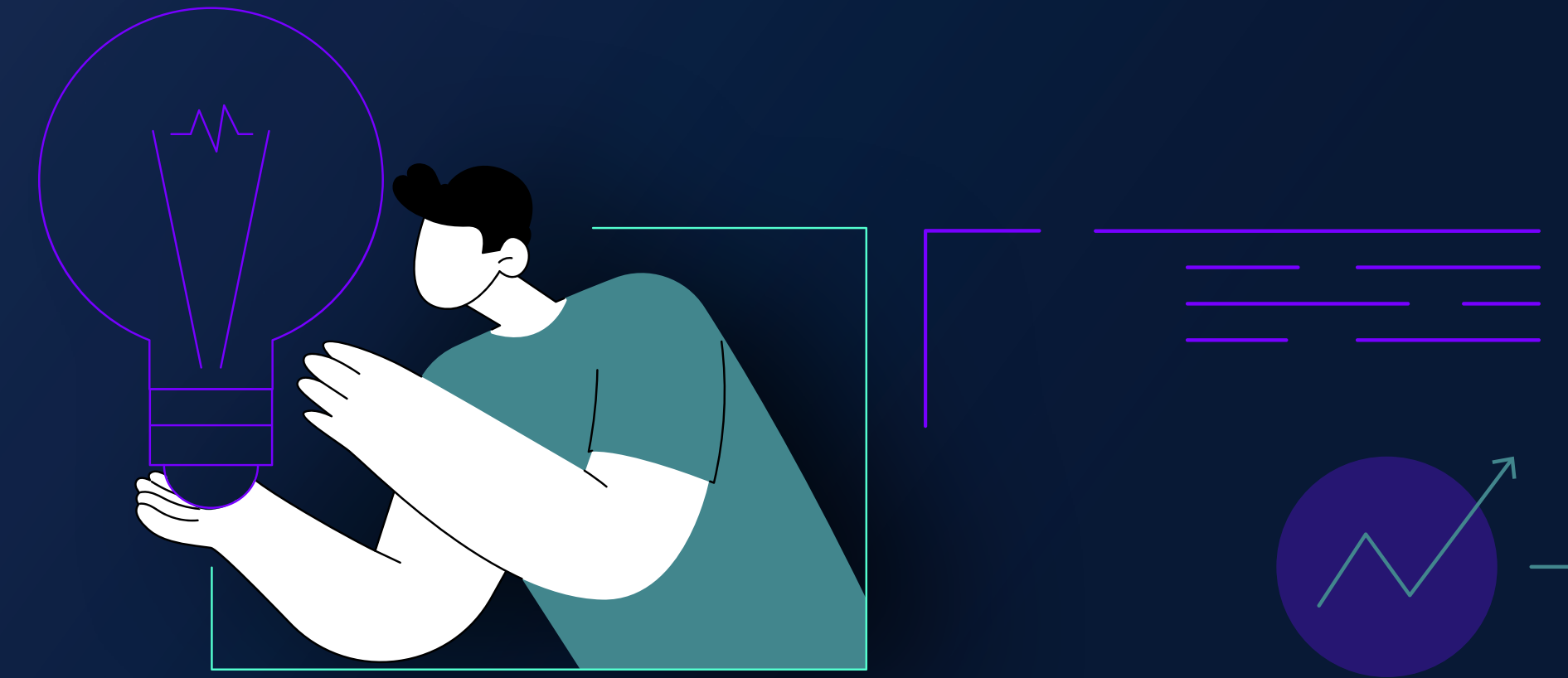
So if change management should be so high on our agenda, why are so many businesses failing in execution?

In this section, we have listed the most common issues businesses face that prevent or stall change management with quotes from the likes of Tetra Pak and **Konica Minolta** who have been there and done it...



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Many businesses don't recognize change as a necessary evolution, often resulting in change fatigue, and the first step to overcoming change fatigue is normalizing continuous change and understanding the need for continuous change. A solution isn't something that is just deployed and then constantly generates increasing value. Instead, business benefits start to accrue daily once using the processes, but the business must constantly improve and optimize them and introduce new functions and features.



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"We have had a whole lot of change over the last few years. We've had changes in customer expectations, how to shift service delivery or business models to meet those expectations... the list goes on. But we have met those demands, and although there is still work to be done and improvements to be made, we need to start to become excited about what we've proven we can do and harness that excitement into forward momentum. Service has no limits, except for those who choose to sit still".



SARAH NICASTRO

Future of Field Service Creator &

IFS VP of Customer Success



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Even if the change you're making is unpopular but absolutely necessary, it's vital to consider your employee's feelings and ask for their feedback on how to make the transition easier. By doing this, not only will your change management strategy improve, your adoption will be more successful as people understand what and why the change is happening and what value add it will have to their working life.



"As a leader, you need to balance confidence and vulnerability, I can talk to my people about something being hard and challenging and acknowledge the reality of it, but I still have to be incredibly positive about the outcome we're working towards."

McKinstry Co.
In Conversation with Future of Field Service



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There are going to be people who will take longer to embrace change and a few who are completely resistant to it, but ultimately, leaders have to push past internal discomfort and focus on the customer outcome they are trying to achieve. This requires a more sympathetic approach to leadership, so it's vital to ensure you're not always outcome-focused and remember to look back at your employees for guidance. Remember, when it comes to change, going live is not a measure of success.

And don't forget your end users! Change affects you internally and externally, so when it comes to customers, Victoria Royle, Senior Customer Experience Consultant at IFS advises...

[Hear more from Victoria Royle](#)



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When we say people-centric change management - it should cover everyone your business touches including your customers. (B2B) customers compare their CX experiences to their consumer life. You need to gather historical and new feedback at the beginning of a change management process and look beyond the complaints and compliments and assess how what they're telling you can actually transform your operations. For example, someone saying that wait times for support are too long may not require you to employ more agents in your team, they may instead require a digitized self-service platform that allows customer autonomy. That in turn affects your internal staff and so goes the cycle, but ignoring your customers during a period of transformation is a sure-fire way to lose trust with some of the people who matter most."



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A change case is never isolated. So when you are building a business case for change, start by understanding the impact upstream and downstream – so when you implement your change management strategy you can be prepared for the hurdles that may delay execution.

A starting point for this is to include representatives from across the business (both back office and field). This way any impacts on current business processes are more likely to be uncovered, adapted, and included in the training, resulting in a faster speed of adoption.

Tetra Pak is an advocate for this approach, and in a presentation at the Future of Field Service Live Tour, stated that the biggest challenge is often internal mindset...



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"You need to find the right team from the beginning who can really help to start off the transformation because there will always be the detractors and there will always be the front runners and you need the front runners in the beginning, but then you need to attack the middle... Because if the middle mass isn't with you, it doesn't happen. So, mindset is one part and I think capability is the other. I have some capabilities, but I don't have them, so, how do we also bring the outside perspective in, how do we make sure that we bring the right capabilities that we need who can help us with the transformation."

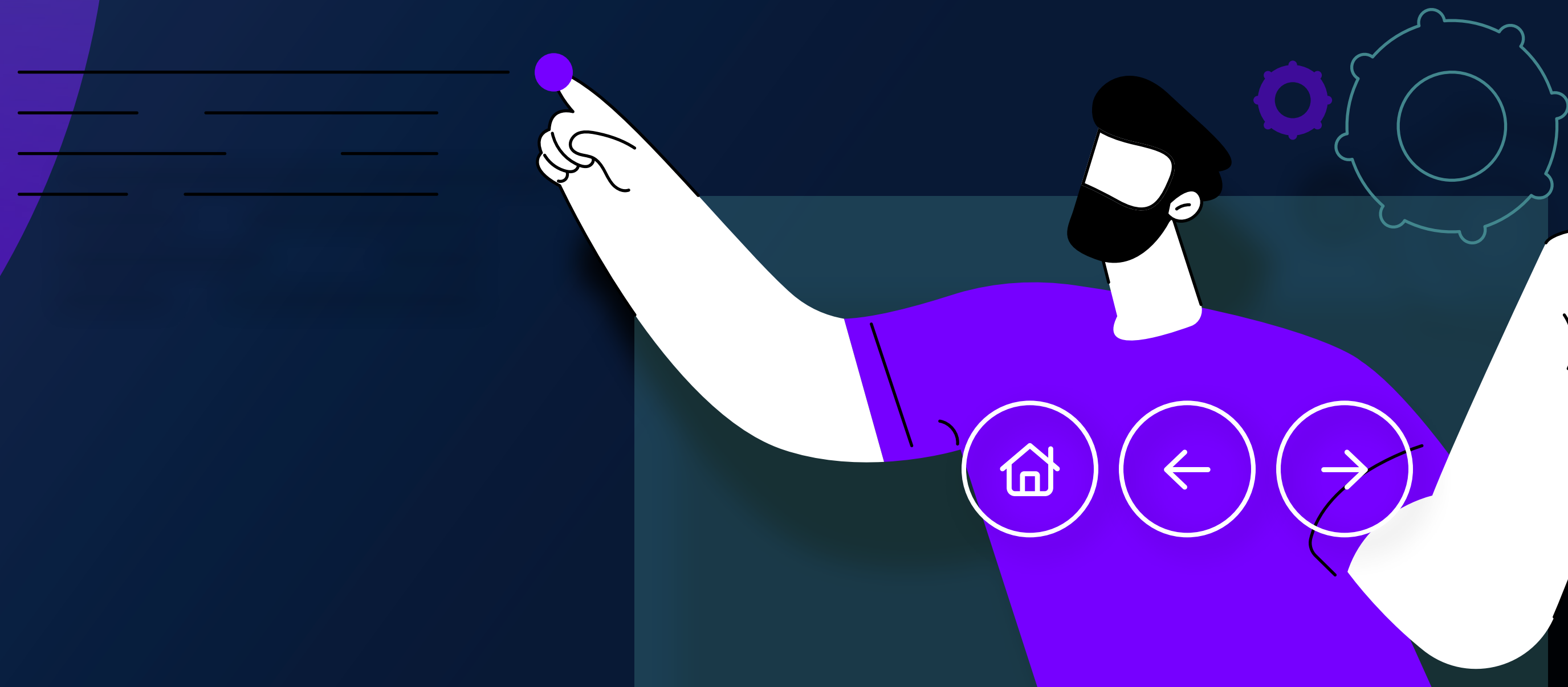
Tetra Pak
In Conversation with Future of Field Service



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Secondly – find a senior sponsor who will advocate the change. Actively engaging the sponsor is particularly important if you have a ‘no customization’ approach. Often the purchasing decision is made based on evergreen goals for upgrading software, but this mandate is not shared, or not shared strongly enough to the next-level managers and end users who will help design the new system. This goal needs to be stated and frequently repeated to support the project team in making the right configurations and necessary changes to business processes.



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"Resistance is simply concerns that haven't yet been addressed"

DR. ELIZABETH MORAN

Consultant and Executive Coach

An extension from our point above - you have to invest time into change management and ensure that from the get-go of a project- your front-line workers understand why you are changing the way they work. It sounds simple but many organizations **overlook this step** and mandate new processes forcing employees to adapt, whether they understand why or not. Someone actively overcoming this very issue during a current service transformation project is Berit Hallgren, Program Director at Tetra Pak...

"Our primary communication (during this transformation period) is **sprint reviews** every 3 or 4 weeks. Then from the program perspective, we are doing demos on a regular basis, retrospectives, and planning on a quarterly basis. So that's when we invite the more senior stakeholders to take part in the planning. And you need some form of governance, even if it's agile as you need to understand whether are things going in the right direction.



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So, we are doing monthly steering team meetings, basically on the program level, if there is a need. If there is no need, then we skip it. Change and communications work so closely together. We have a change manager for the program. And I think that is something fluffy for many, what does it really mean? But if you don't take that seriously, the whole change part, there is a

huge risk of failure. So, I said from the beginning, we need to change the manager in the program, otherwise, we will fail because there are so many other things to keep together."

As in the case of **Tetra Pak**, the key is to focus on concise, relatable communication the better it will be received and digested. Keep in mind that your goal in communicating around change isn't just getting a point across, but also building rapport and connection.

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Today, the world is an open book. That's why authenticity in the modern working world should be a key focus for you during a period of change. If you're caught out, credibility and trust can be lost and your employees lose psychological safety.

Our practical advice? Adopt a model where all business changes are consolidated into a single backlog, allowing visibility of everything that's happening across the business and IT allows you to immediately focus on the areas that drive the biggest and fastest return on value first. The reason many organizations fail to embrace this transparency is that it requires individual departments and individual leaders to compromise on what they want to prioritize, and this can seem at odds with the operational business objectives. But if you can get past this, you'll drive focus around just those things and make change happen effectively.



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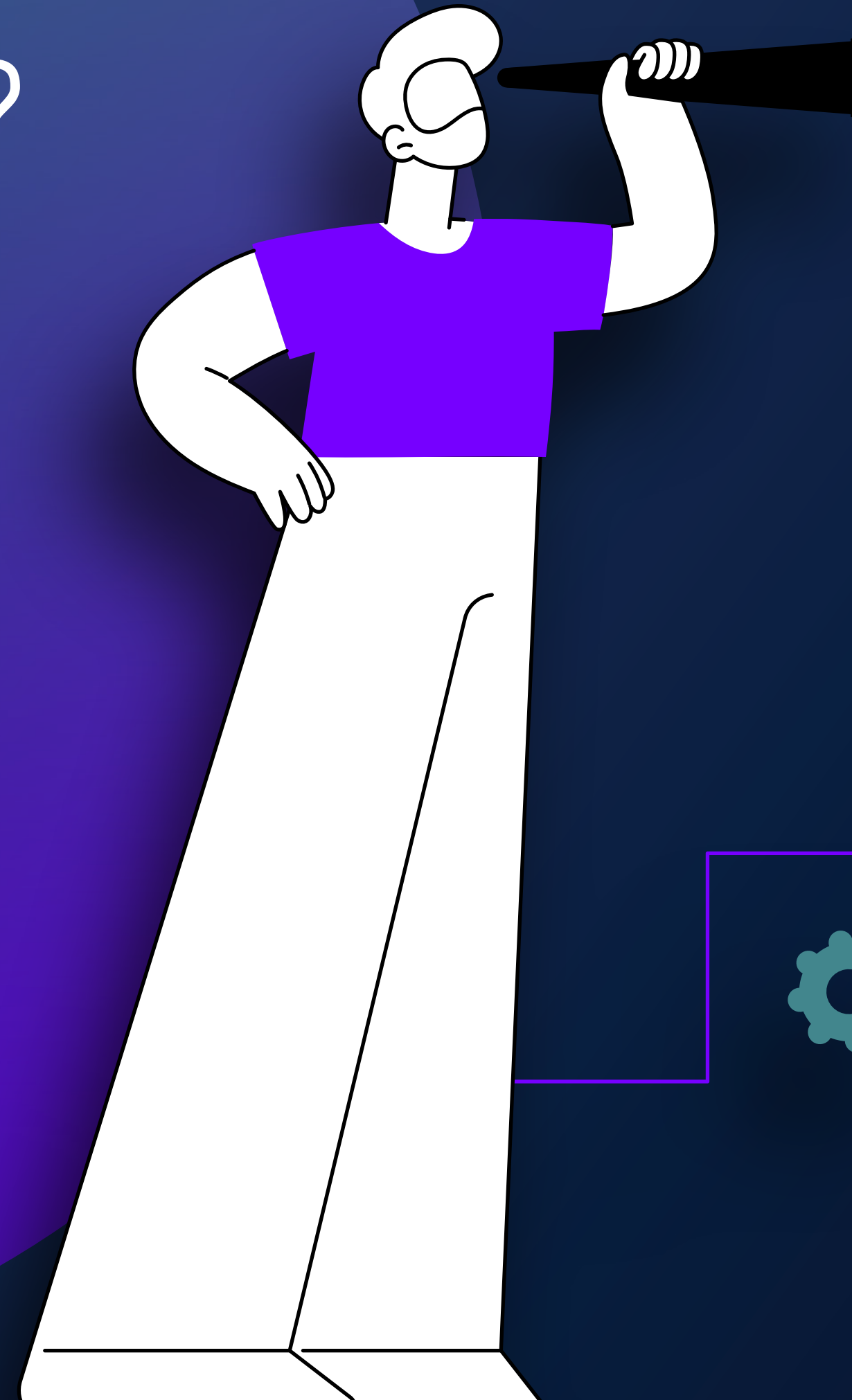
A company who have recently implemented a new field service technology and has experienced a change management process is Tetra Pak. who recently spoke to the implementation and how they have been an open book throughout the process...



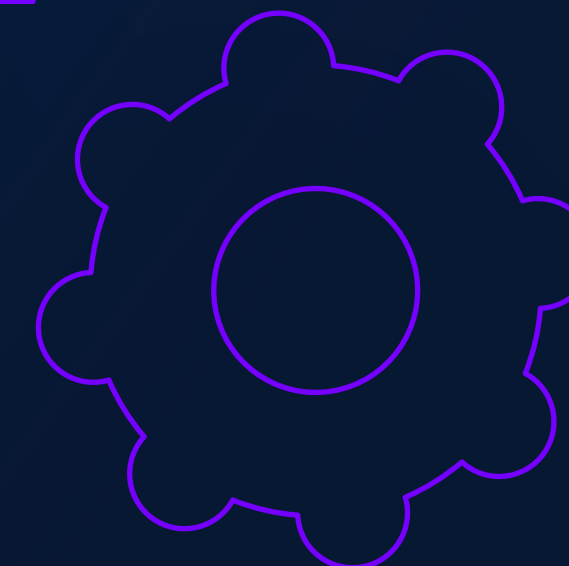
"We sat down and put people together from all of our national printing companies and harmonized the (change) process by looking at the goal and assessing existing processes we needed to improve and which we didn't need anymore while considering cultural compromises (across European teams). We got our list of processes and created questions for an RFI and took 4 to RFQ. We had companies sharing answers to these questions and a board of

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our customers reviewed the solutions, and then made the vote for the product. Now in implementation, we will make one template that everyone else can emulate, and we are then starting an ambassador program to implement the new technology. We have a product owner who works in the background and aligns from front to back, ensuring that the outcome is perfect customer experience."

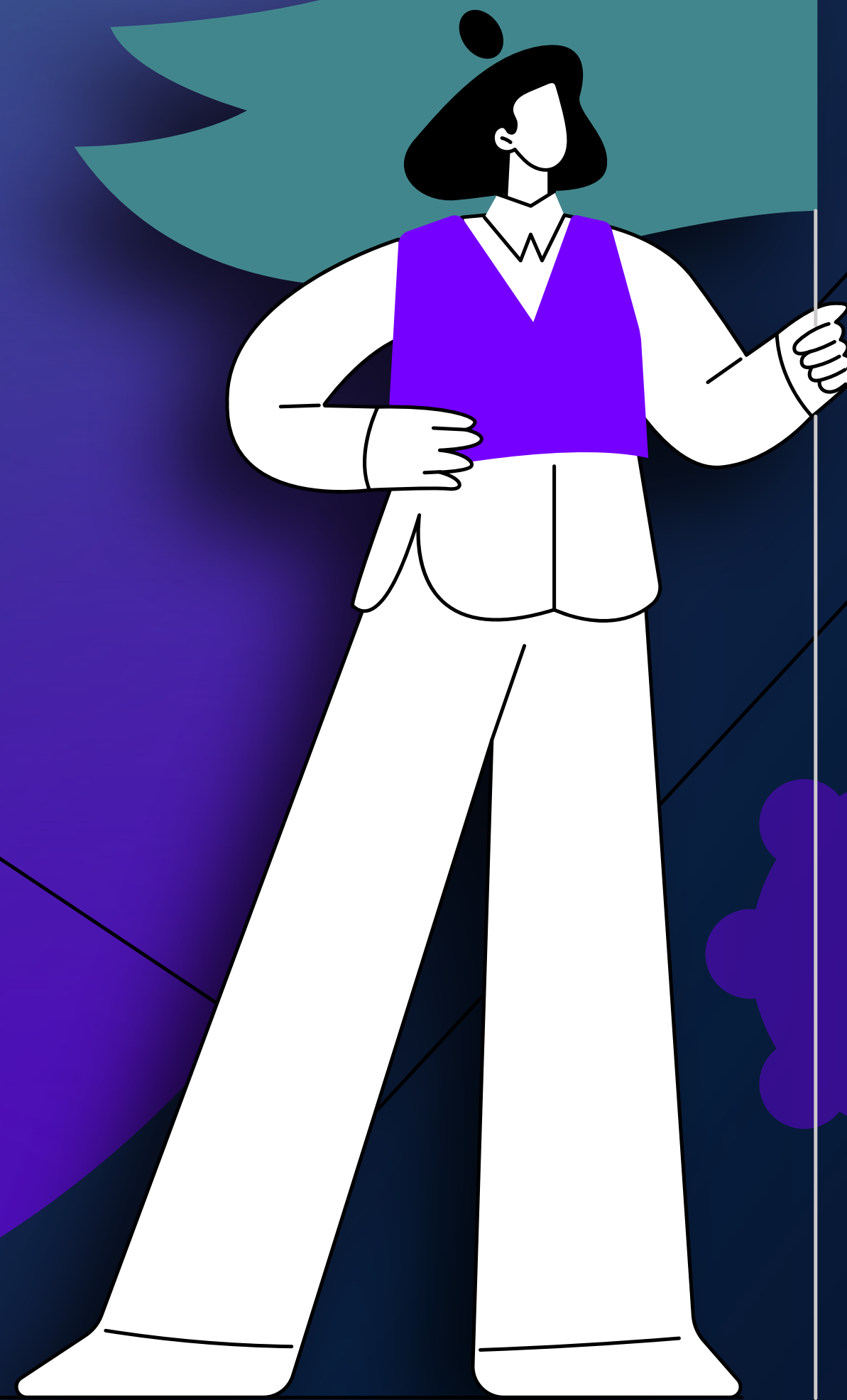


How to Succeed

- **Introduction**

- ○ Recognize Efforts and Impact
 - Focus on Collaboration Over Communication
- ○ Help Employees Visualize Change
 - Prioritize Ample Training and Upskilling

So you know the pitfalls – but
what are the ways you can ensure
your transformation goes to plan?
Here are our top tips on success in
change management...



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You rely on your employees, often front-line workers, to spearhead your company's evolution from its historical incarnation to its modernized identity, so put them first in your strategy. All too often, businesses forget to acknowledge the emotional, intellectual, and/or physical effort employees change the lack of humanity in this approach will not make be prosperous.

Change management would be far more successful if we showed empathy around how hard change is and recognized them for not only their willingness to grow and evolve with the business but for their efforts to learn and succeed in whatever the new normal is we're introducing.



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"Investing in people increases competitive advantage. It ensures happier customers. It actually solidifies the business growth. It increases efficiency in work and actually attracts more quality talents. I mean, good people attract good people. So that's why investing in people and investing in change management will pay its dividends because you will be able to reach your destination faster and better and more efficiently"

RIAS ATTAR

Business Strategist, Transformation Expert, and Author



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Make sure you remember that change cannot be managed with communication alone, it requires collaboration. In fact, when you focus your efforts on collaboration over communication, you may find a good percentage of your change challenges alleviated.

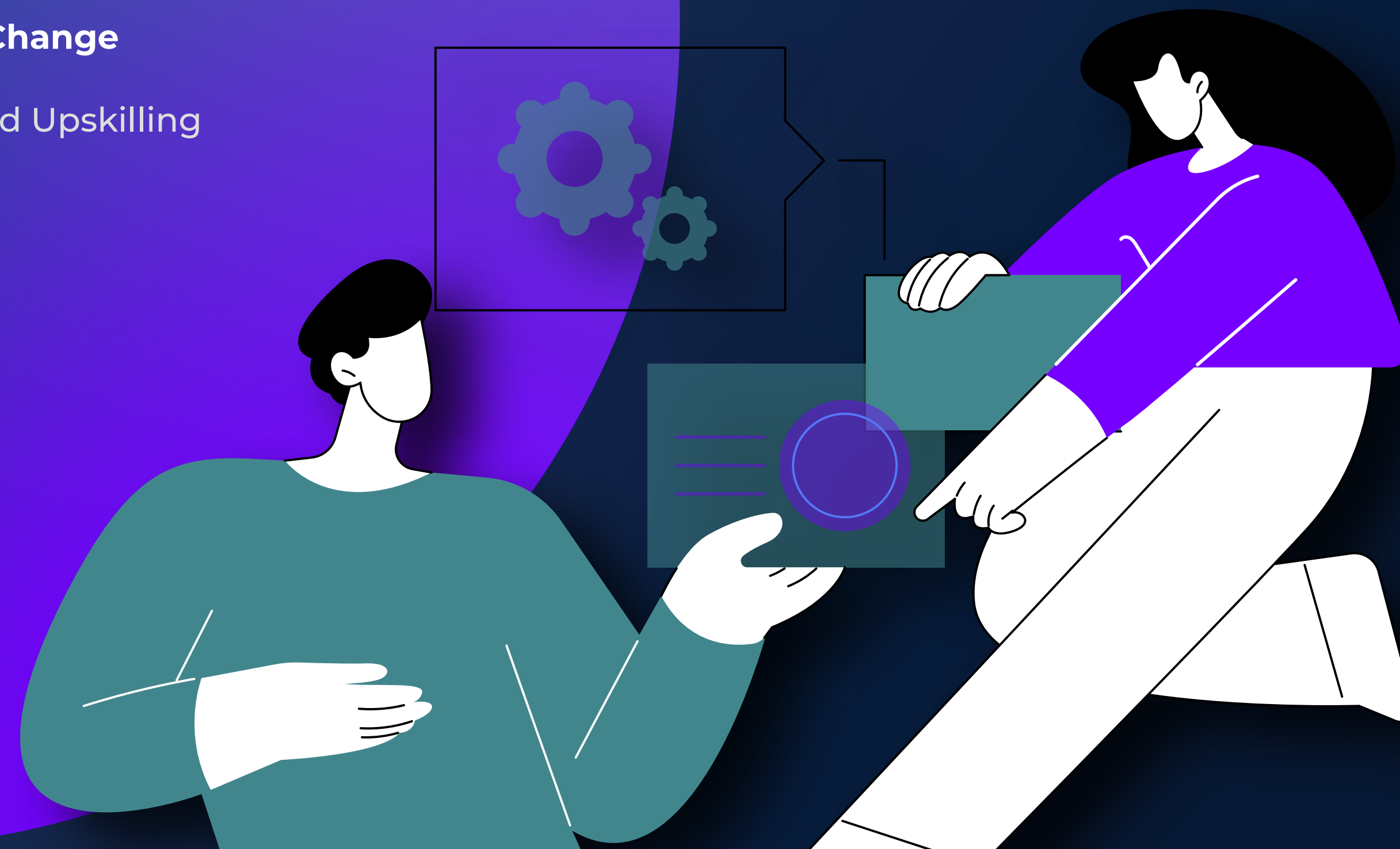
You should not be focused on simply delivering a message – or a mandate – and expecting your workforce to fall in line. Rather, you need to understand the value of collaboration – a bi-directional exchange of points that ensures everyone is on the same page, feedback is heard, acknowledged, and change is not begrudgingly accepted - but embraced.



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In a discussion with the Future of Field Service Podcast Schnedier Electric shared work they had done with the Nour Group to help create a visualization of strategy. This visualization takes a plethora of detailed content, that can be consumed if and when it needs to be and simplifies it into one easy-to-digest graphical page...



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"The Nour Group helped us go through our whole strategy slide deck, that 40-page slide deck that we all have sitting in a desk drawer somewhere, on a thumb drive. We took that and boiled it down to one page, that's a very visual, graphic document, that really spells everything out, walks your audience through the whole strategy, and takes away that corporate speak. We use this visualization... and then print it out on mousepads, and use it as a backdrop. Having it in many different places, so that it's really repeatable, like a drum beat continuously throughout the year. It's something like a war cry. Everyone can rally around this visualization and identify themselves there."

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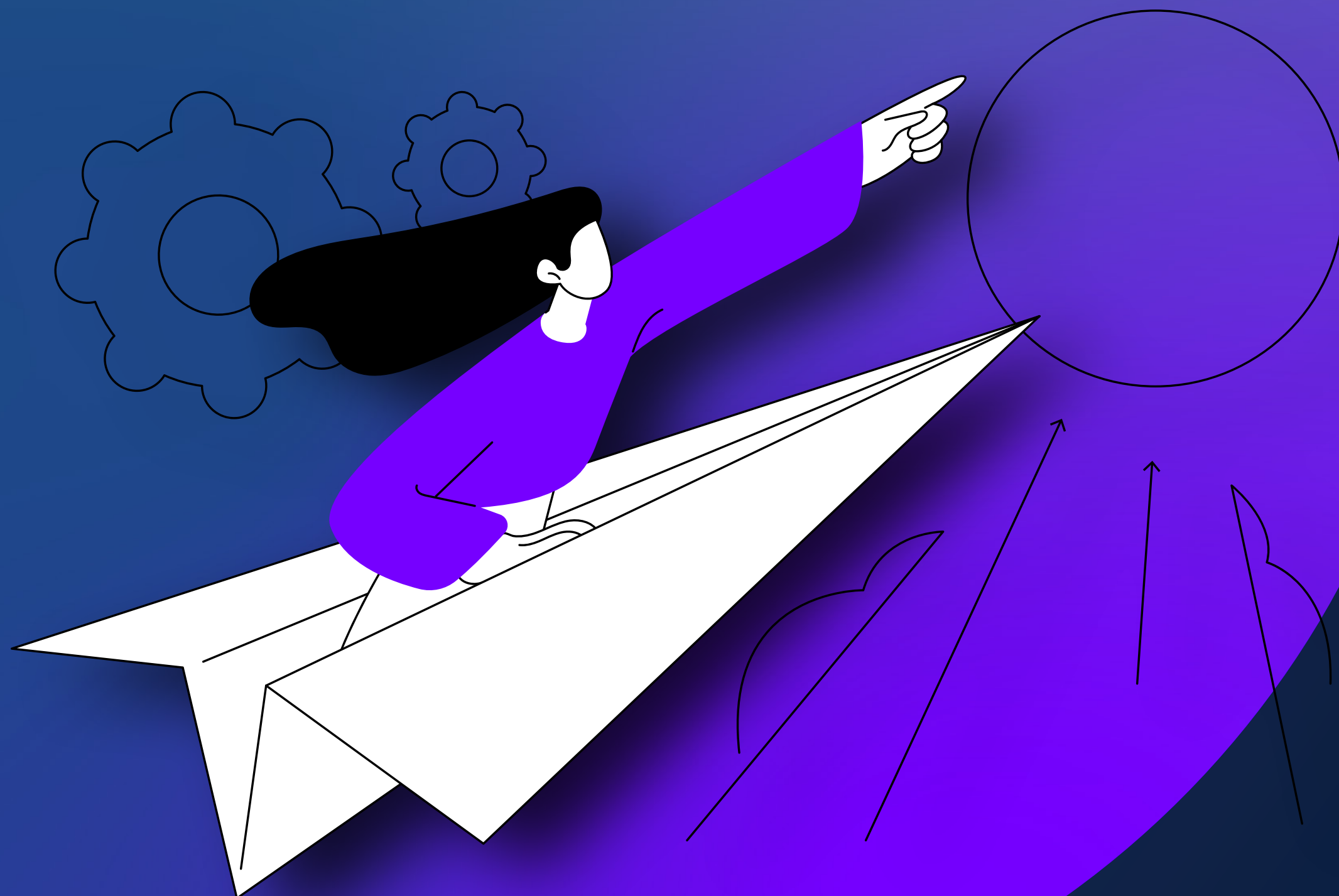
We know that resistance to change is largely fear-based, and in today's circumstances where frontline workers may have some valid trepidation around how their roles are evolving, the role of ample training and upskilling in change management cannot be overemphasized. Maybe you're asking your workforce to use new technology – you need to ensure you bear the burden of not only selecting a strong solution but providing however much training your employees need to feel confident in that tool's use.

Perhaps their role itself is evolving, with new service objectives requiring a different approach and therefore different skills. This is a reality for many businesses today, and that causes a lot of overwhelm for your workers.

If they know from the beginning that they play an incredibly valuable role in your company's evolution and that you are committed to providing them with every upskill opportunity available to make them successful – they may not fear the change so much.



And this is just the beginning...



The conversation around **change management** is ever growing and the industry is collectively moving along the path to transformation, each in their own way. There are leaders who have successfully transformed service to be a customer-centric, digitally capable profit centres and who are ready to innovate above and beyond. There are others who have tried and failed because they weren't ready for the change, and many in between.

But the most exciting point to take away is the potential that lies on the other side of the hard work. The work may never be done – and that's OK. Part of evolving to be a modern business is recognizing that change is ongoing and that the transformation is never “complete.”

Embracing that is what fuels your journey and allows you to surpass your initial objectives time and time again.

Learn more from “Field Service in Focus”





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