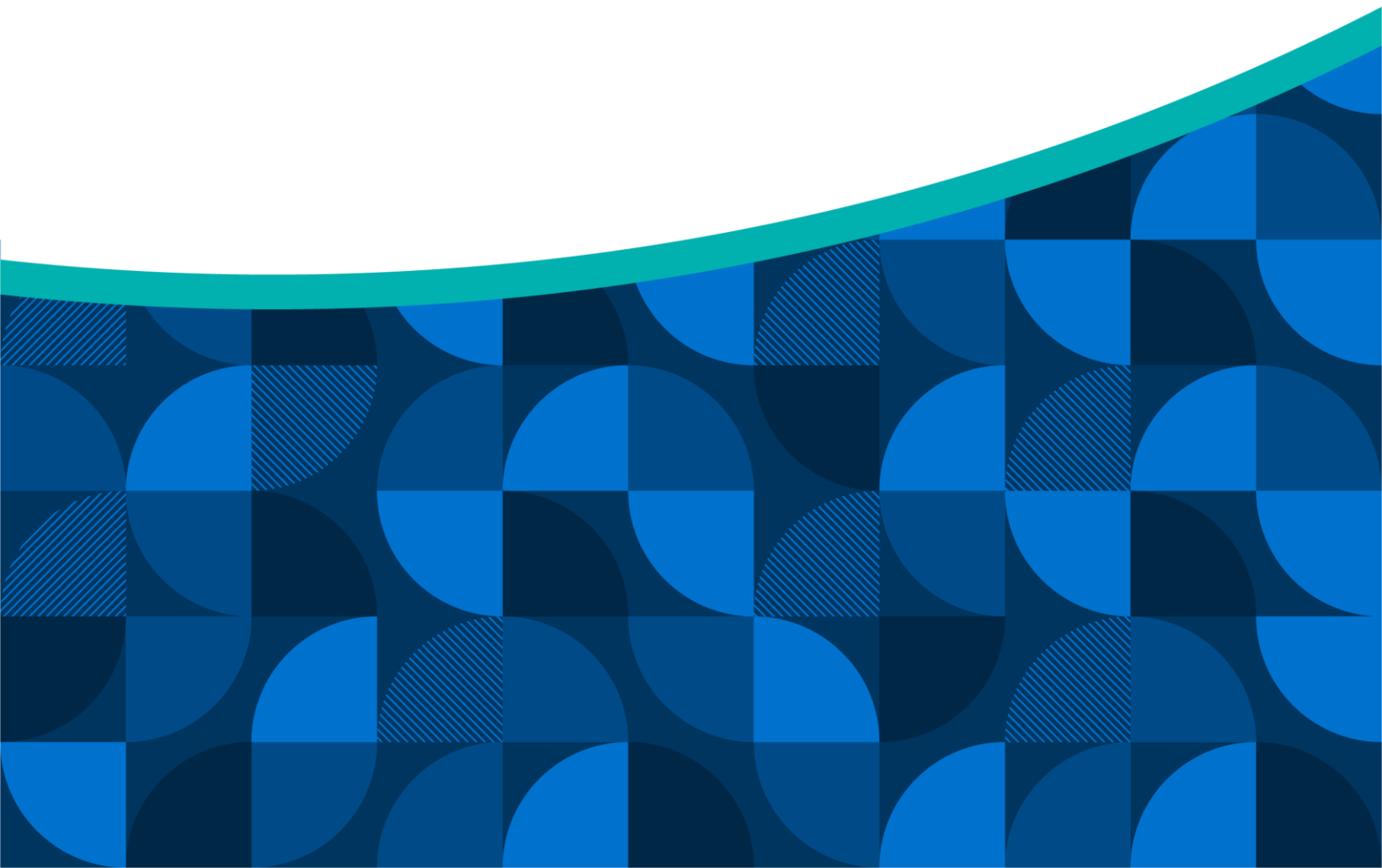




EDIFY

How to Become a Change Champion

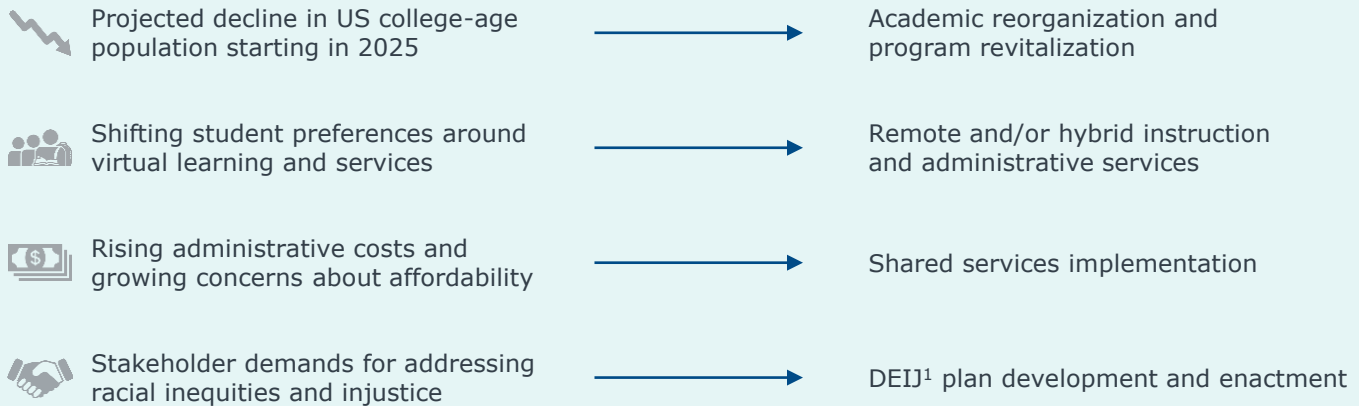
A Toolkit for Advancing New Technology Initiatives



Change is Now Constant

There's growing urgency for colleges and universities to adapt faster than ever before. This means more large-scale change initiatives. Most of these changes aren't wholly new, but in the past, schools could tackle them one at a time—and less frequently. Today, one-off and small-scale changes are no longer sufficient. Instead, leaders must simultaneously innovate in multiple areas across the institution and make changes to core services and operations.

Higher Education Market Pressures Inspire Large-Scale Change Initiatives

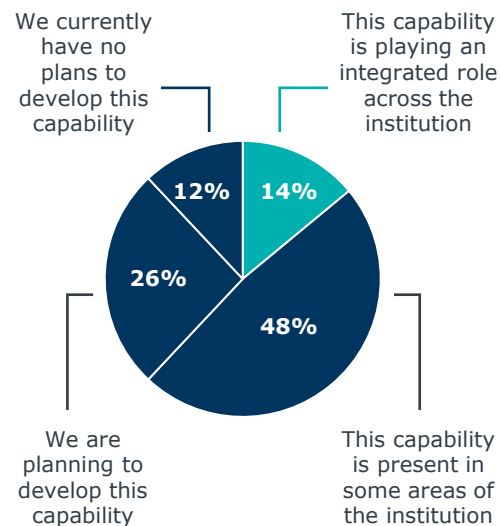


Despite the urgent need for change, higher ed has had less success leading change efficiently than many other industries. This is partly due to a lack of change management capabilities and capacity. Many higher ed leaders also fall victim to some common pitfalls and misunderstandings about change management. Collectively, these mistakes reduce the likelihood of successfully leading any campus change initiative.

Many Institutions Lack Sufficient Change Management Capability

Percent of institutions with change management capability integrated in planning and strategy

n=495 (presidents, provosts, cabinet members)



Common Change Management Mistakes Higher Ed Leaders Make

-  View change management as a one-time event
-  Take too narrow of an approach (e.g., focus exclusively on communications or incentives)
-  Fail to anticipate and assess the real-world impact of changes, especially on key stakeholders
-  Delegate responsibilities to deputies instead of playing an active role in ongoing efforts

1) Diversity, equity, inclusion, and justice.

What Does It Mean to Lead Change?

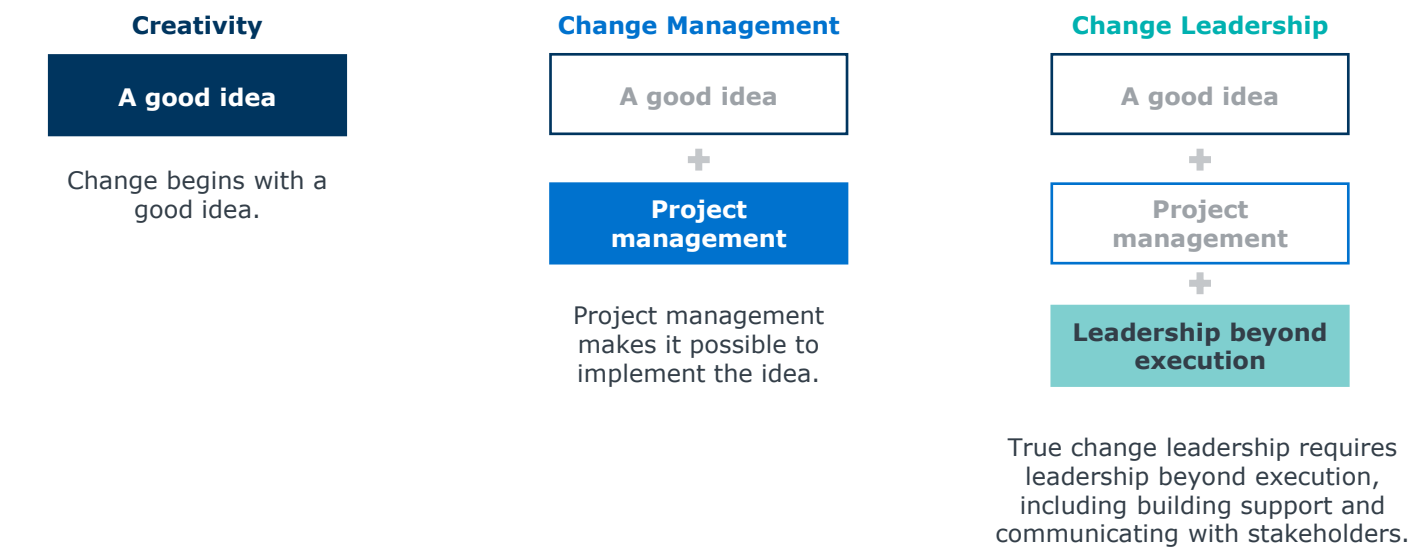
Today’s higher education leaders need to think beyond change management to change leadership: leadership beyond execution. The large and complex nature of the change initiatives institutions are contemplating requires intentional communication and coalition-building.

Leading change is a multistep process that draws on many skills:

- Leaders must determine their own level of personal commitment to the initiative.
- To minimize the risk of failure, they must identify key stakeholders and then gain and hold their support.
- Finally, they must develop a communication strategy that is tailored to the individual interests of those who matter most to the success of the initiative.

Mastering these steps and skills takes time—and combining them to advance change initiatives is a hallmark of sophisticated leaders.

The Anatomy of Change



Change leadership is...	Change leadership is not...
✓ Targeting a specific behavior change	✗ Instilling comfort with uncertainty
✓ Garnering enough support	✗ Gaining universal acceptance
✓ Being politically savvy and communicating persuasively	✗ Managing tasks and deadlines

Building Agility Takes Priority

As colleges and universities attempt large-scale change initiatives across their institutions, having reliable data is paramount. Connecting new and existing technology and data systems is therefore a critical element of any large-scale change.

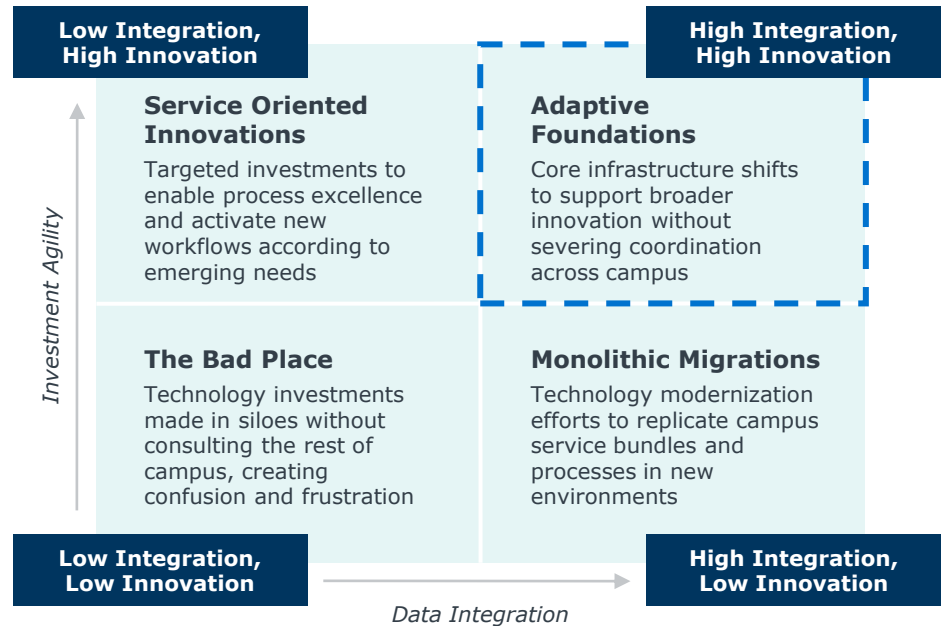
The best way to do this is to build an **adaptive foundation**. This is a solution that enables high integration *and* high innovation. This allows you to invest in the right tools for your goals and initiatives, then easily connect them and replace tools and systems that no longer meet your institution's needs.

The Role of Change Leadership

We know technology investments are risky, especially in this time of tight budgets and shrinking enrollments. Failure is unfortunately common: in a recent EAB survey¹, **30% of leaders experienced a failed analytics technology initiative** in the last 5 years.

Applying change leadership principles to your technology investment strategy can help you build the cross-campus support you need for a major infrastructure change.

Technology Investment Strategies for Digital Agility



Applying Change Leadership to Your Investment Strategy

Common obstacles to large-scale technology change

Limited technical understanding

IT projects aren't widely visible

ROI is measured in retention

Stakeholders have limited time

How to make the case for enterprise investments

Communicate the vision at the strategic level to **secure a visible executive champion**

Prioritize a campus partner project in the initial scope to **show near-term value**

Articulate the business case to **enfranchise new stakeholders** to define the value

Simplify messaging focusing on project outputs and value to obtain board-level approval

1) N=65 leaders surveyed in the fall of 2022.



How to Use This Toolkit

Change leadership breaks down into three parts: accepting the challenge, mobilizing your stakeholders, and communicating effectively. This workbook contains three worksheets, each corresponding to a different part of the framework. By completing the activities on each page, you can **gauge your readiness to lead a technology-based change initiative** and **plan the steps you need to strategically engage others** in the change.

WHAT'S INSIDE

Your Three-Step Framework for Leading Change

- 1** | **Accept the challenge;** make a commitment to change *Page 6*
- 2** | **Know your stakeholders** and strategically mobilize them *Page 7*
- 3** | **Secure commitment** through effective communication *Page 9*

Tool 1: Make a Commitment to Change

Use the tables below to understand your readiness to champion a change.

- 1. Think of a specific improvement idea you’re considering and write it in the space below.
- 2. In each row, circle the number that corresponds to your level of agreement with the statement.
- 3. After each section, add the numbers you circled in each row to calculate your section total.
- 4. Combine your section totals to calculate your overall total.

The improvement idea I’m considering: _____

I. Recognizing the Need for Change	Disagree	Uncertain	Agree	Strongly Agree	Absolutely Agree
I have observed the situation	1	2	3	4	5
The current situation has had a detrimental effect on my area of responsibility	1	2	3	4	5
Failing to resolve the issue will bring continued harm to my work area; the consequences of inaction are severe	1	2	3	4	5

Section total:

II. Embracing the Right Solution	Disagree	Uncertain	Agree	Strongly Agree	Absolutely Agree
The proposed solution meets the identified need	1	2	3	4	5
Given other possibilities, the proposed solution most directly addresses the identified need	1	2	3	4	5
I will be able to obtain the resources I need to implement the proposed solution	1	2	3	4	5

Section total:

III. Hardening Personal Resolve	Disagree	Uncertain	Agree	Strongly Agree	Absolutely Agree
I am willing to make this initiative a top priority	1	2	3	4	5
The benefits of pushing this initiative through outweigh the costs to me	1	2	3	4	5
I have the right skills to lead this initiative	1	2	3	4	5

Section total:

Understand your readiness to lead the change

An overall total less than 36 indicates that you do not feel strongly enough about the improvement idea to be its champion. Any section total lower than 12 suggests that the element or idea should be reevaluated.

Overall total:

Tool 2: Know Your Stakeholders & Strategically Mobilize Them

Use the table below to understand your stakeholders.

1. Considering the improvement initiative you chose in Part 1, identify the stakeholders at your institution who would be involved in the change. List them in the column on the left.
2. Use the table to mark each stakeholder's source(s) of stake, stance, and sense of urgency regarding the chosen initiative. Sources of stake and stances are defined below.

Sources of Stake (stakeholders may have more than one)

**Power**
Holds the authority and ability to prevent or allow a change to take place

**Agency**
Is responsible for designing and carrying out the change effort

**Constituency**
Is impacted by a change or concerned about the results of a change

Stances

**Supporter**
Can be counted on to support and promote the initiative, even if problems arise

**Undecided**
Uncertain of his or her position; could be swayed to take action in spite of indecision

**Dissenter**
Actively opposed to the initiative; not expected to switch his or her allegiance

Stakeholder Names	Source(s) of Stake			Stance			Sense of Urgency		
	Power	Agency	Con-stituency	Supporter	Un-decided	Dissenter	Low	Medium	High
Example Dean	☒	☒	☐	☐	☒	☐	☒	☐	☐
Example Faculty Member	☐	☒	☒	☒	☐	☐	☐	☐	☒
Example IR Analyst	☐	☐	☒	☐	☒	☐	☐	☒	☐
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Tool 2: Know Your Stakeholders & Strategically Mobilize Them

Use the grids below to determine how to approach stakeholders.

- 1. Refer to the table you filled out on page 4.
- 2. Map stakeholders into the table below by writing their names and/or titles in the appropriate square(s) according to their source(s) of stake and stance.

What is each person's stake in this change?			
What is each person's stance regarding this change?	Power	Agency	Constituency
	Hold the authority and ability to prevent or allow a change to take place	Responsible for designing and carrying out the change effort	Impacted by a change or concerned about the results of a change
	Example Dean	Example Dean	Example IR Analyst
		Example Faculty Member	Example Faculty Member
Undecideds			
Uncertain of their position; could be swayed to take action in spite of indecision			
Supporters			
Can be counted on to support and promote the initiative, even if problems arise			
Dissenters			
Actively opposed to the initiative; not expected to switch their allegiance			

Plan for engaging stakeholders

Use the grid below to understand your goal for engaging stakeholders you mapped to each square in the table above.

	Power	Agency	Constituency
Undecideds	Obtain acceptance Gain their firm commitment to the change initiative	Tap into knowledge Consult their knowledge to design or refine the change	Gain compliance Convince them to participate in the change and/or alter their behavior
Supporters	Leverage power Use their support to obtain resources and influence other stakeholders	Delegate ownership Assign them responsibility for components of the process	Build momentum Use their support to exert pressure on others to change
Dissenters	Overcome dissent Use a variety of methods to offset their influence	Work around Find a supporter with knowledge to counter their negative messages	Negate urgency Keep an eye out for efforts to convert others to opposition

Tool 3: Secure Commitment Through Effective Communication

Use the grid below to understand how to prepare to communicate with different stakeholders about the change.

1. Read through the profiles below to understand what stakeholders want from communication about a change initiative.
2. Consider the stakeholders you identified in Part 2 and categorize them in the spaces below.
3. Use the checklists to determine whether you are prepared to effectively communicate in stakeholders' preferred communication styles.

Communication profile 1: The Fact Finder <i>Requires data and logic in support of the argument</i> • Responds to concisely articulated concepts • Apt to query assumptions and underlying analyses	Communication profile 2: The Architect <i>Needs transparency around structure, process, and methods to be used</i> • Perceives interrelation between multiple timelines or activities • Focused on sequence of next steps	Communication profile 3: The Strategist <i>Must envision a connection to larger goals</i> • Understands drivers of strategic action within the organization • May request proposals for expanded timeline or scope of activities	Communication profile 4: The Diplomat <i>Concerned with preserving and growing relationships</i> • Seeks consensus opinion across constituents • Identifies individual motivations • Assesses impact on current and future relationship
Which profiles do your stakeholders fit into? Sort stakeholders in the spaces below.			
Are you prepared to communicate with stakeholders who prefer this communication style? Below is a list of requests this communicator may make; check off which ones you can meet.			
To give confidence to the fact finder : ☐ Data ☐ A summary of evidence ☐ Explanations of methodologies employed in calculations ☐ Citations ☐ Confirmations ☐ Projected results	To reassure the architect : ☐ Timelines ☐ Workplans ☐ Job descriptions ☐ Protocols ☐ Projections of impact to other activities ☐ Feasibility studies	To inspire the strategist : ☐ Statement of purpose ☐ Alignment of plan with existing goals ☐ Confirmation of senior leader support ☐ Evidence of previous adoption by best-in-class institutions	To energize the diplomat : ☐ Assurance of stakeholder support ☐ Evidence you've considered the potential impact on human capital ☐ Evidence you've considered the preferences of individuals involved

Plan for communicating with stakeholders

- If you listed stakeholders in a given communication profile column, do you have enough evidence to meet their needs?
- If not, how can you strengthen your case?

You don't need to check off all items for every profile, but the lists can provide direction for communicating your initiative to different stakeholders at your institution.

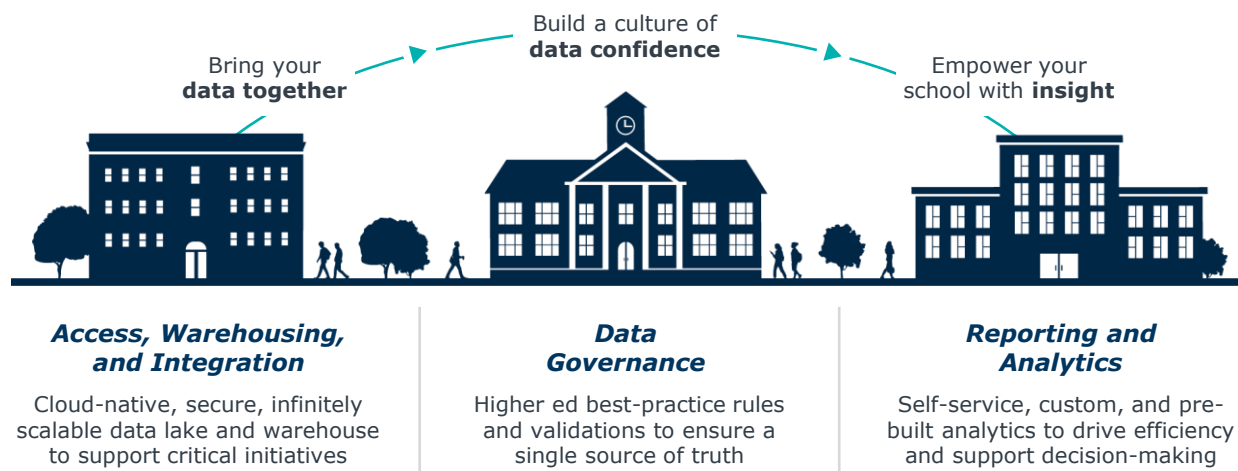
Keep the Momentum Going

The pressures facing colleges and universities today create compelling new reasons to change the way institutions approach their operations, including data infrastructure. But leading large-scale technology change presents unique challenges—like building momentum through collaboration and communicating the tangible value improvements will bring—and these initiatives require ongoing attention.

Building your change leadership capacity is critical to navigating this landscape. As you reflect on what you learned in this workbook, EAB is here to help.

Edify Is Your Path to a Data-Informed Campus

Make Better Decisions with Data Management Designed for Higher Ed



Extend Your Team's Capacity

NEW: AI

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Professional Services

Work with experienced higher education data experts who understand your environment and goals

See how the Edify platform helps you create an agile infrastructure.

Visit www.eab.com/edify to learn more and request a demo.

Speak to David about building your change leadership capacity.

Email David to schedule a call.

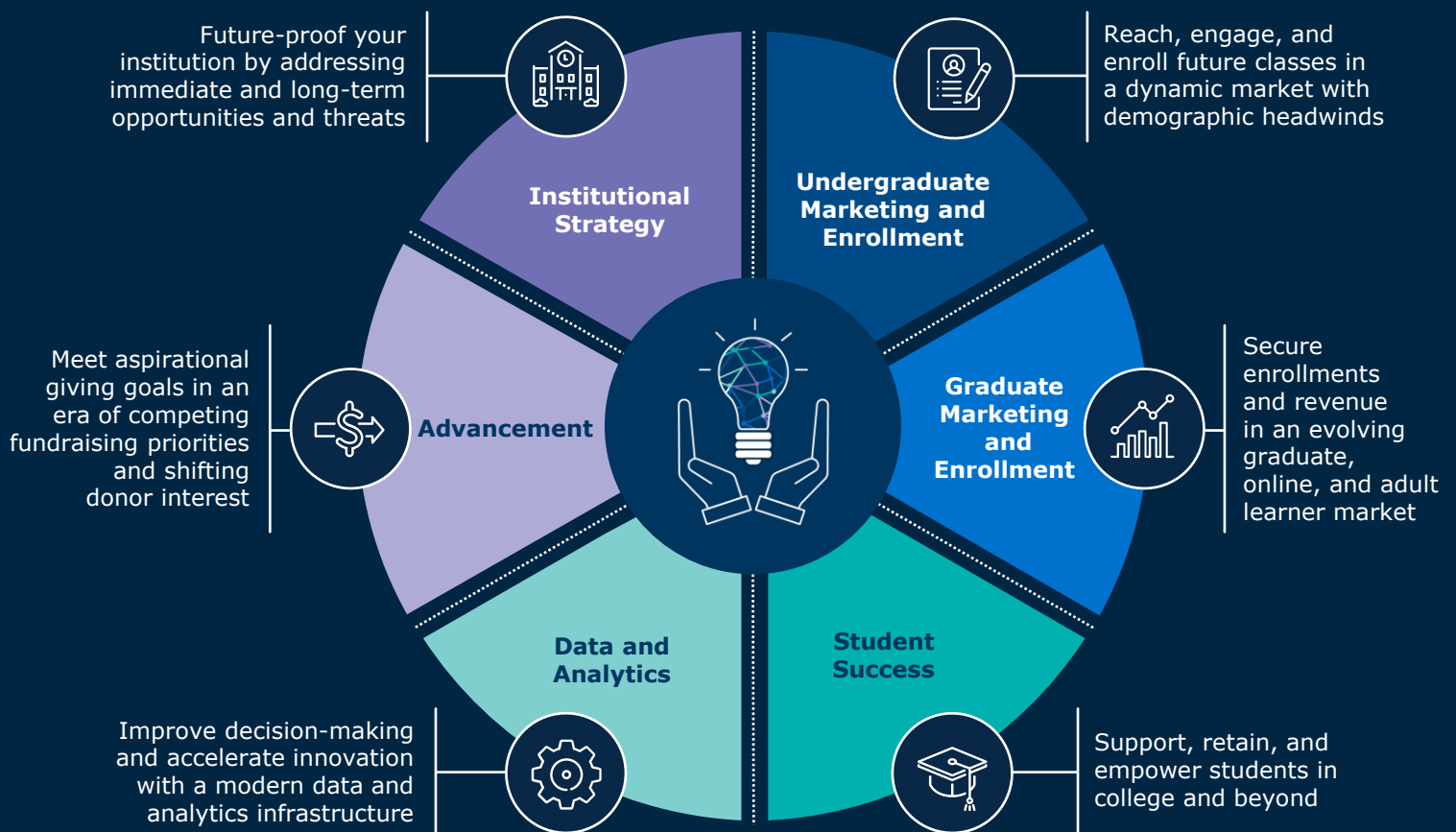
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Edify: A Data & Analytics Solution Designed for Higher Education

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