**A Case for Change**

Every change plan has several elements. When treated appropriately, those elements work together to create a change plan that is aligned from the moment the consumer begins reading or listening. Everything must work with everything else to keep the plan on track as a fundamental guide to how you want a specific change or set of changes to take place. Those elements are analysis, formulation, implementation, and evaluation. You will see that the chapters in your text support your work as you learn to develop each of these elements.

**Analysis**

The analysis phase of the case deals with a scan of external factors that impact the organization as well as an internal scan of factors. Below, you will see a table that is designed for your use in categorizing external factors that impact the organization. You can type into this table as you work through your analysis to help organize your work.

Opportunities are advantages that belong to an entire industry, and the individual organization does not have control over them. OPEC reduces the price of crude, so oil companies can reduce the price of gas. The result is that more people buy more gas. The fuel industry has the opportunity to sell more gas.

Threats are disadvantages that belong to an entire industry, and the individual organization does not have control over them. For example, the crash of the housing bubble caused many companies to fail if they were associated with housing. The housing industry suffered. Higher gas prices cause people to buy fewer and smaller cars. The automobile industry suffered. A health conscious society results in the consumption of fewer soft drinks. The soft drink industry suffered.

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| **Environmental Pressures** | **Opportunity** | **Threat** |
| Fashion |  |  |
| Mandate |  |  |
| Geopolitical |  |  |
| Market decline |  |  |
| Hypercompetition |  |  |
|  |  |  |

Below, you will see a table that is designed for your use in categorizing internal factors that impact the organization.

Strengths are advantages that belong to a single company, and the company exercises control over the ability to build this advantage. For example, no matter where I go in the world, I can recognize a Coca-Cola can. Coke has the strongest brand identity in the world, because they spent countless dollars building and exporting their brand. Troy University is #3 in the United States for technology and information security, because we have spent many man hours as well as dollars to insure the safety and security of our information.

Weaknesses are disadvantages that belong to a single company, and the company exercises control over the ability to build this disadvantage. For example, a university (not in the U.S.) recently told me that they had been through four presidents in the last five years. The impact is that this university is suffering from new broom changes, many of which have not been allowed to play out over the course of time. The university is struggling to keep enrollments up and to provide good service to their students.

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| **Organizational Pressures** | **Strength** | **Weakness** |
| Growth |  |  |
| Integration and collaboration |  |  |
| Identity |  |  |
| New broom |  |  |
| Power and politics |  |  |

Below, you will see a table that is designed for your use in categorizing organizational functions that can support or impede change.

|  |  |  |
| --- | --- | --- |
| **Organizational functions** | **Strength** | **Weakness** |
| Management |  |  |
| Marketing |  |  |
| Accounting/Finance |  |  |
| Information systems |  |  |
| Research and development |  |  |

Analysis is a description *only* of the factors that will impact the organization’s need to change. This is not the place to discuss what strategies need to take place nor is this the place to introduce your recommendations. Analysis is only a description, albeit a very detailed description. This is the place to do some research on the industry and the environment, because many organizations are simply not familiar with the overall environment of the industry. Often, they internalize their problems as “I’m just not good enough” when there are other factors that contribute to the problem.

**Formulation**

This is the piece that addresses the goals and strategies that you recommend for change. Take on the persona of an outside consultant, and set goals and strategies in an assertive manner. For example, do not tell the organization that it should improve sales. That is far too generic and will not help the organization improve its bottom line. Instead, tell the organization HOW to improve its sales. Give the organization a set of goals and strategies that help it to improve sales. Make recommendations in a straightforward and knowledgeable manner that will help people in the organization want to change.

**Implementation**

This is the piece that describes the set of action steps that you want to see to fulfill the goals and strategies that you created in the formulation phase. For example, if the goal is to improve sales and if the strategy is to improve sales through market penetration, you want to hire more sales people to help cover the market. The first step in this is to have the HR department hire more sales people. Tell HR how many people you want to hire and when those people need to be on the job. In this phase, you need to be very specific about dates, timelines, who is responsible, how many of what, and all the details that will help your change plan become a reality.

**Evaluation**

Evaluation is a simple phase if your work in the implementation phase was detailed and provided quantitative expectations. For example, if you told the company to hire 10 sales people by Nov. 1, 2013, the measure is quite simple. Did the company hire 10 sales people by Nov. 1, 2013? If not, why not?

For evaluation, I suggest that you create a table that includes the following columns:

Which action step are you measuring? Who is responsible for reporting results? To whom is that person reporting? When is the outcome expected? How will the outcome be measured? What is the expected outcome? Was the outcome met? (This is a yes or no. Keep it simple and straightforward.)

As you work through your cases we will add a piece to each case. The “No Good Deed” case focuses on analysis and formulation. In McDonald’s, we will add implementation. Finally, in your personal project case, we will add evaluation. The key to developing a case for change is organization, so keep this as organized and straightforward as you can. This is not meant to be tricky, because if it is too tricky, people will not understand your plan and become resistant immediately. I prefer plans that answer questions before they can be asked.

Imagine you presenting this case and having the following conversation during the presentation.

“Why do we need to do this?”

“We need to do this because….. You will find that on page 14.”

If you want to learn to think outside of the box, this is the time to do it. Anticipate questions and give details. Stay away from generic directions, such as “You should do more marketing” and go toward, “We need to spend X dollars on your marketing over the next 6 months to improve your market share.” When you evaluate your plan, you can measure dollars, time, and market share.