



CHANGE MANAGEMENT WHITE PAPER

October 2019

TEAMFIRST

TeamFirst is a people and team analytics platform that improves workforce happiness and engagement, allows you to understand your people, and manage them and your culture accordingly. It improves project quality, billable income, and people retention while reducing costs. It provides managers with dynamic feedback and decision tools to construct, manage and evolve more effective team compositions. In the process, it improves general quality, happiness and sentiment within the business.

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This document discusses change management and strategies with TeamFirst to maximise the positive impact of the product. This document does not explain the rationale behind the product in detail and assumes the reader has read the TeamFirst Whitepaper.

Why does the introduction of TeamFirst require Change Management?

One of the biggest obstacles a company will face, whether it is a change in size, or the introduction and adoption of a new system, is ensuring that they and their employees are properly equipped and educated on why the change is happening, as well as having the correct tools to manage and embrace the change. Changes in HR or project tools normally require change management. Not only are the ideas and concepts potentially new to the workforce but implementing TeamFirst often results in changing processes, which requires change management. In addition, the product is geared around improving workforce happiness, which means that some questions may potentially be asked that people could feel uncomfortable with if not explained.

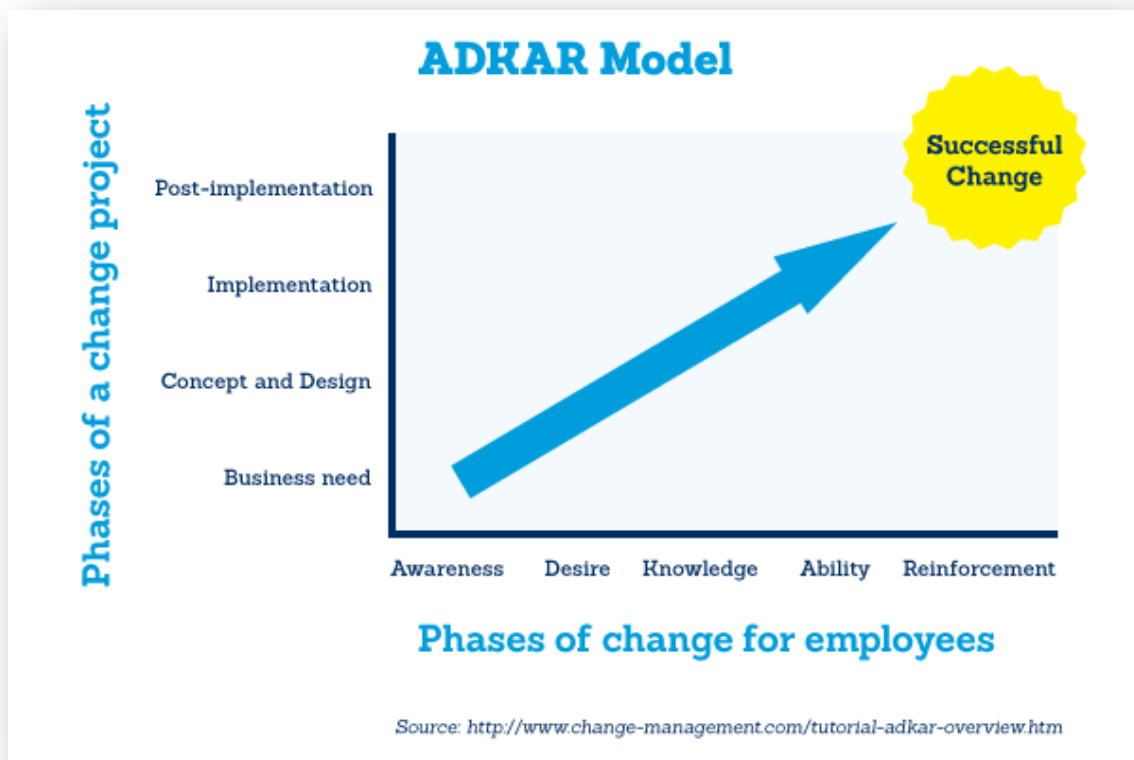
The Change

Implementing a system that alters or abolishes current processes and introducing new ones can be challenging, even if people dislike the current processes. TeamFirst uses questions set by the organisation in order to track behaviour, sentiment and technical skill and to intervene where required. The question set is normally aligned with company culture.

Plan your Rollout

Depending on the size of your organisation, our recommendation is to roll TeamFirst out to a couple of teams, and thereafter progressively to the rest of the organisation. Global Kinetic (size 80 people at the time) and GLI (Size 40) rolled TeamFirst to the entire organisation at once, including top management, with success. Some questions to consider:

1. Who will have managerial access?
2. How will questions and KPIs be determined?
3. Which teams will be using TeamFirst and how many teams will people be in?
4. Who will champion the rollout and understanding of the product?



Awareness

Why is the TeamFirst process better than the current process? What is the purpose of using TeamFirst in the organisation, how will it help each person and how will it make the workplace better? What data is anonymous and what isn't? Who has access to data and dashboards? Who can see my data and my comments?

We recommend that our Business Engagement Team works with you and your teams to explain the product and take the team through the first iteration of using the tool.

Desire

Participation is key to buy-in of new processes. Consider:

1. Allowing teams to be involved in the selection of pilot teams, if you were to roll out a pilot first, or roll out incrementally,
2. Allowing team members to be part of the process of determining questions and KPIs. Linking these to the organisation's values is recommended,
3. Explaining who will have access to data and who can see what information in TeamFirst. Explain how anonymity in TeamFirst works, and who can see feedback. Transparency is of utmost importance.

Knowledge

Know how to change and identify what the change will look like in terms of skills and behaviours. Fortunately, TeamFirst is easy to use with the minimum of instruction. Team members use the app on their phones, and managers use the app on their desktops. The TeamFirst Whitepaper explains the product in detail, and the TeamFirst Business Engagement Team is available to you to answer questions and be present at meetings, or to present and explain the product in more detail.

People need to understand how to interpret the scores and numbers calculated by TeamFirst. What does it mean if your score or rating for a specific value deteriorates? How do you get help and who do you speak to when this happens? How does a lowering of score indicate an opportunity to improve the workspace?

Ability

For most companies that work in an Agile or Scrum environment, TeamFirst dovetails with the current process and fits in with the Retrospective ceremony. For teams that do not work with such a process, TeamFirst works with any process that has a cycle, like a monthly management meeting.

Reinforcement

TeamFirst reinforces itself by supporting better person and team management within the organisation. The direct and indirect cost saving should be reflected in finance and staff happiness and staff turnover.

Minimize the Downside of Change

The downside of change is minimized through consistent, open and honest communication. So, if it doesn't already exist, start developing an integrated communications approach by partnering with human resources, external communications and other key functions within the organization. At the same time, communicators must build or improve upon a communication friendly culture by increasing support and visibility from all organizational levels.

Tips:

- Communicate, communicate, communicate.
- Develop and share communication toolkits including timelines, talking points and frequently asked questions to ensure leaders and managers are all communicating consistently.
- Be a good listener, noting reactions, emotional trigger points and opportunities for further discussion.
- Increase the amount of face-to-face communication giving leaders, managers and employees the opportunity to increase their visibility and credibility with employees while sharing information and answering questions.
- Leaders and managers must deliver realistic messages without making promises they can't keep.

Maximize the Upside of Change

Communicating the change goal or vision is vital to the success of an organizational change. Employees who understand the “big picture” and are aligned around a common purpose have an easier time moving forward; they know where it is they are going. By maximizing the upside of change, business results are accelerated.



Case Study: Global Kinetic

Global Kinetic has been using TeamFirst for 2.5 years. TeamFirst was the response to the change that was needed in our business. We realised that the older and more traditional approach to quarterly performance reviews and performance management within our business were no longer having the positive effect that we hoped and had experienced in the past. The outcomes were becoming mundane instead of useful.

What we found was that by the time a Team Lead, or manager, met with a staff member once a quarter; any information, concerns or conflicts the employee was having, had taken place too long ago and by the time it came to our attention, it was too late to address with any level of meaningfulness. The effect of this was that certain employees had become disengaged as they felt that their concerns were not being addressed soon enough. In addition, issues with specific individuals or conflict between people took too long to come to the surface, resulting in team morale and quality suffering while these conflicts were in effect.

Involved Evolution

Many people at Global Kinetic had concluded that quarterly reviews were ineffective and that we needed a more immediate and better process. We needed continuous engagement and reviews within our teams. The process of introducing TeamFirst into our business was a consistent and well calculated one. As we built the application and its features, we ensured our employees were involved in what the product would look like, why it needed certain features and how we were going to utilise it.

Open Communication

Keeping communication lines open and informing everyone of the product, the reason we wanted to introduce it and how and when we planned on introducing it, was imperative to our success. The process was deliberately relaxed (yet still fun and enticing) and well timed as to not interfere with our day to day operations. We ensured that our people received the necessary training and information on how to use the tool correctly and how to interpret and understand the results. Most importantly, we led by example.

In other implementations of the product to external clients, the project leads along with the entire team that was to be onboarded on the system, was given a demonstration of the product which explained how to use it, what data was asked of each person, and most importantly, the level of confidentiality and anonymity provided by the system. Our Business Engagement Team is experienced with this process.

When a person has a potential conflict with another person or wants to leave feedback on their own or another's performance, that feedback can be left without any risk of retribution or causing dissent within a team structure. The company management can determine who within their structures can be assigned the Reporting role, and based on that level, what data they can see about the teams.

When rolling out TeamFirst, endeavour to answer any question or concerns that are raised in the session. If there is a question that you cannot answer that is related to the product, please [contact us](#) and we will provide any information you require.

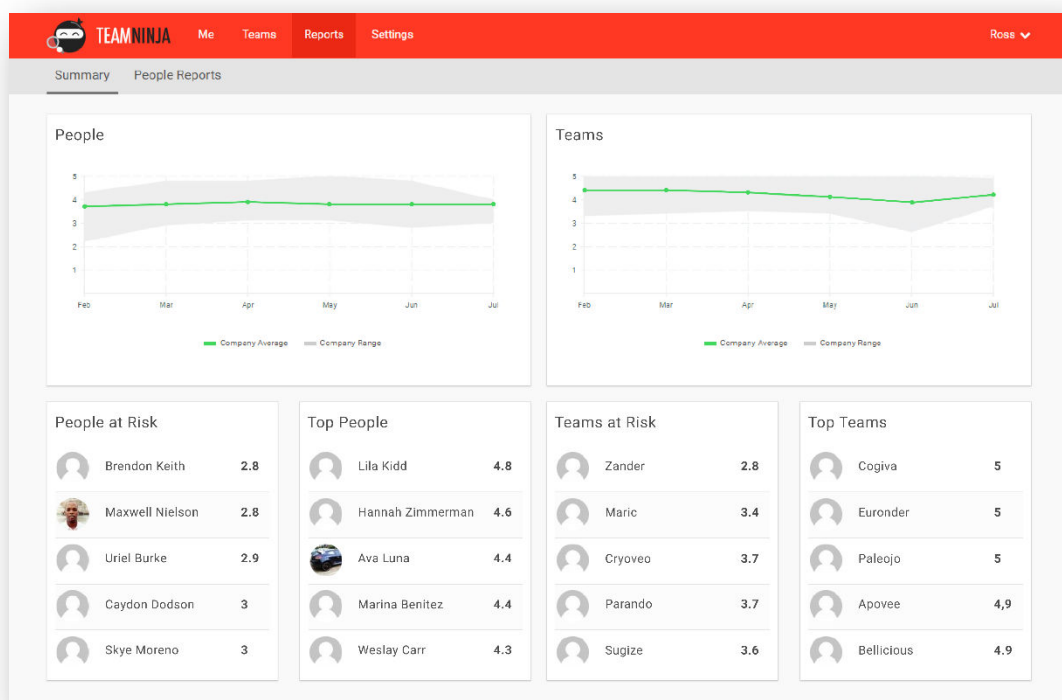


Figure A: a subset of the information dashboard

** TeamFirst Beta's working title was TeamNinja

Multiple teams

At Global Kinetic, most of the workforce are in multiple teams. There is no limitation as to how many teams a person can work in. We have engineers who may work full time in one team, or part time across two or more. We have project teams, as well as peer teams (such as iOS developers, Business Analysts) where peers meet regularly and review each other's work, share trends or innovations.

People can be marked as optional on certain teams, and mandatory on others. Either or both is acceptable. The process of reviewing team members before or during a retrospective is quick and intuitive so being in multiple teams does not add a lot of time overhead to a person's day.

Lead by Example

One of the most critical parts of this process was leading by example. It was important for the rest of the staff to see management using the tool as well and the outcomes that the tool provided. When someone had a query or concern on their feedback and how to use the tool, management were able to give them real life examples of how it affected and improved their day to day life at work.

The most important aspect of change management at Global Kinetic was to position TeamFirst as a tool to help and not a tool to track or punish.