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# Embedding Change Management into your Continuous Improvement Initiatives



**Host: Mark Graban**

Senior Advisor, KaiNexus

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**Presenter: Melissa Sherman**

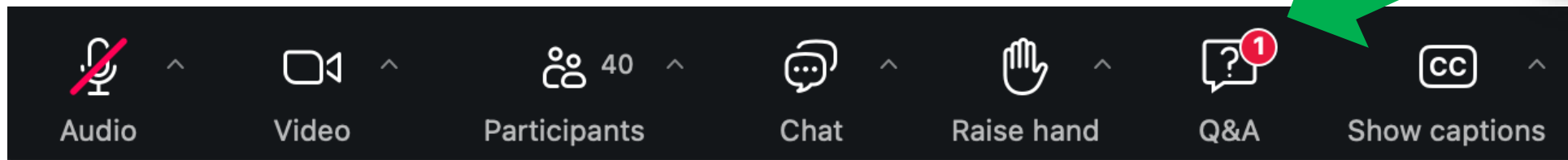
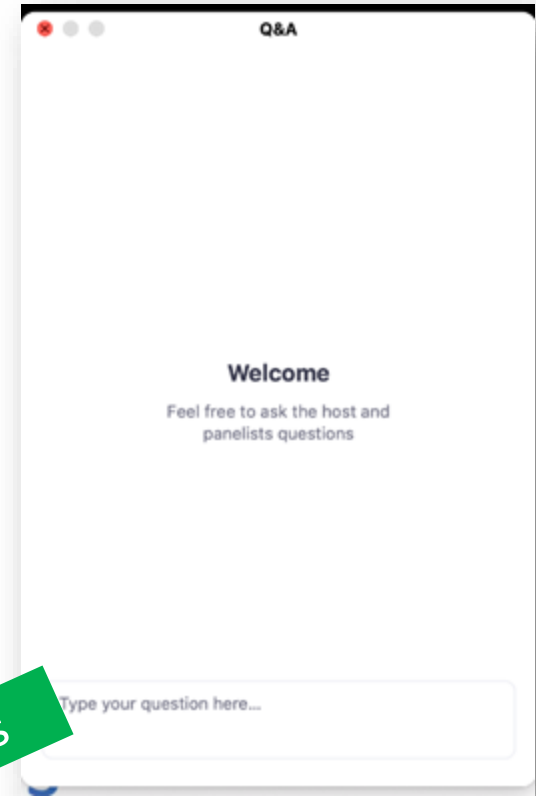
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Michigan Lean Consortium

[msherman469@gmail.com](mailto:msherman469@gmail.com)

# Webinar Logistics

- Presentation (40 minutes)
- Q&A (15 minutes)
  - Use the Zoom Webinar meeting panel to submit a question at any time



- Recording link & slides will be sent via email

KaiNexus.com

# Optimize Your Improvement Work.

KaiNexus is the solution for your Lean and Improvement work where teams can capture, implement, measure, and share in one system that does it all.

▶ Watch Demo

Get Started



# Registration Open Now!

[www.kainexus.com/kainexicon](http://www.kainexus.com/kainexicon)



9th Annual KaiNexus User Conference

# KaiNexicon

📅 April 29-May 1, 2025 | Austin, TX

Home Registration Hotel Information Abstract Submissions

The image shows a screenshot of a website for the 9th Annual KaiNexus User Conference. The main heading is 'KaiNexicon' in large white font on a blue background. Below it, the dates and location are listed: 'April 29-May 1, 2025 | Austin, TX'. At the bottom, there is a navigation bar with four items: 'Home', 'Registration', 'Hotel Information', and 'Abstract Submissions'. The 'Home' item is highlighted with a blue background.

Come Together to **Spread Improvement**

# About Melissa Sherman

- Accomplished Lean Leader
- Sought-After Speaker
- 30 Years Experience in Process Excellence
  - Six Sigma
  - Lean
  - Kaizen



**KaiNexus**

**October 2, 2024**



**Melissa Sherman**

**Sr. Quality Improvement Consultant**

# **Embedding Change Management into your Continuous Improvement Initiatives**

# Continuous Improvement

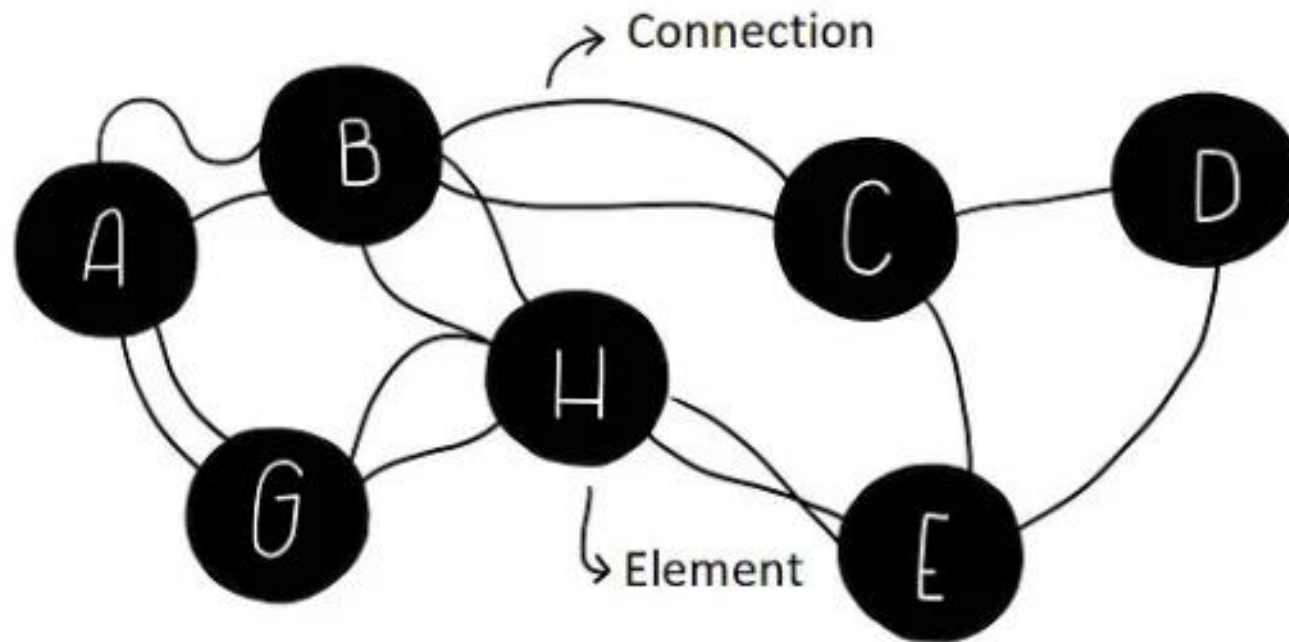


# Change Management



# Systems

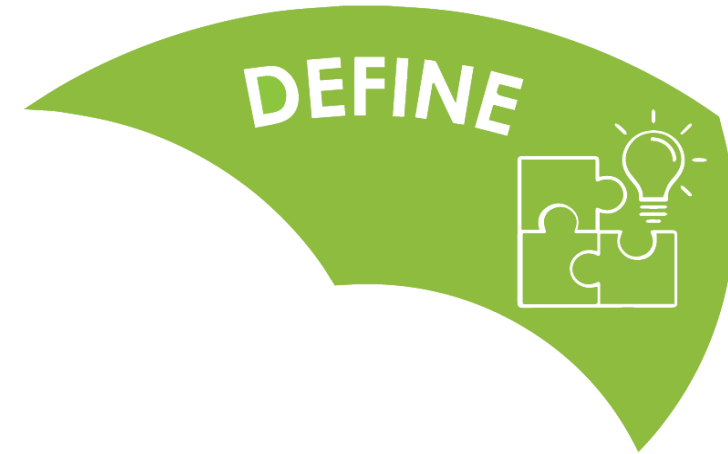
## SYSTEM



# Phase 1



1. Define and breakdown the problem.
2. Grasp the current condition.
3. Set a target condition.



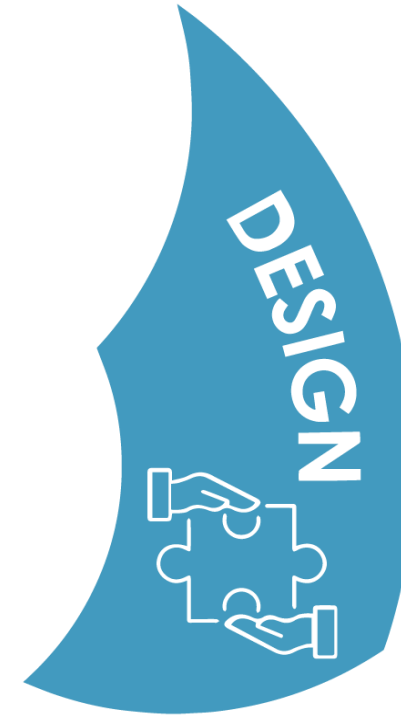
Align and clarify on a clear definition of what's changing and when, who is most impacted, and criteria for success. Review other changes in flight and align that now is the right time for this change. Develop an approach and agree on the level and cost of the change resources needed to support the effort.

“If I had an hour to **solve** a **problem** I'd spend 55 minutes thinking about the **problem** and 5 minutes thinking about solutions.”. — Albert Einstein

## Phase 2



4. Conduct root-cause and gap analysis.
5. Identify potential countermeasure(s).

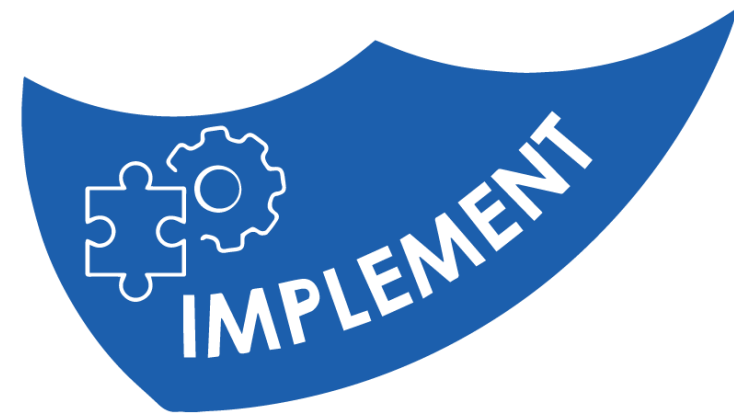


Utilize those closest to the work to identify and document the key activities and timing needed to achieve and sustain measurable results.

# Phase 3



6. Develop and test countermeasure(s).
7. Refine and finalize countermeasure(s).
8. Implement countermeasure(s).



Perform the planned change activities; monitor the expected results for achievement; act accordingly if results are not being achieved.

# Phase 4



9. Measure process performance.



Support, strengthen, and measure the stakeholder's adoption to the new way, validating that the change has become fully implemented and embedded into the business.

# Phase 5

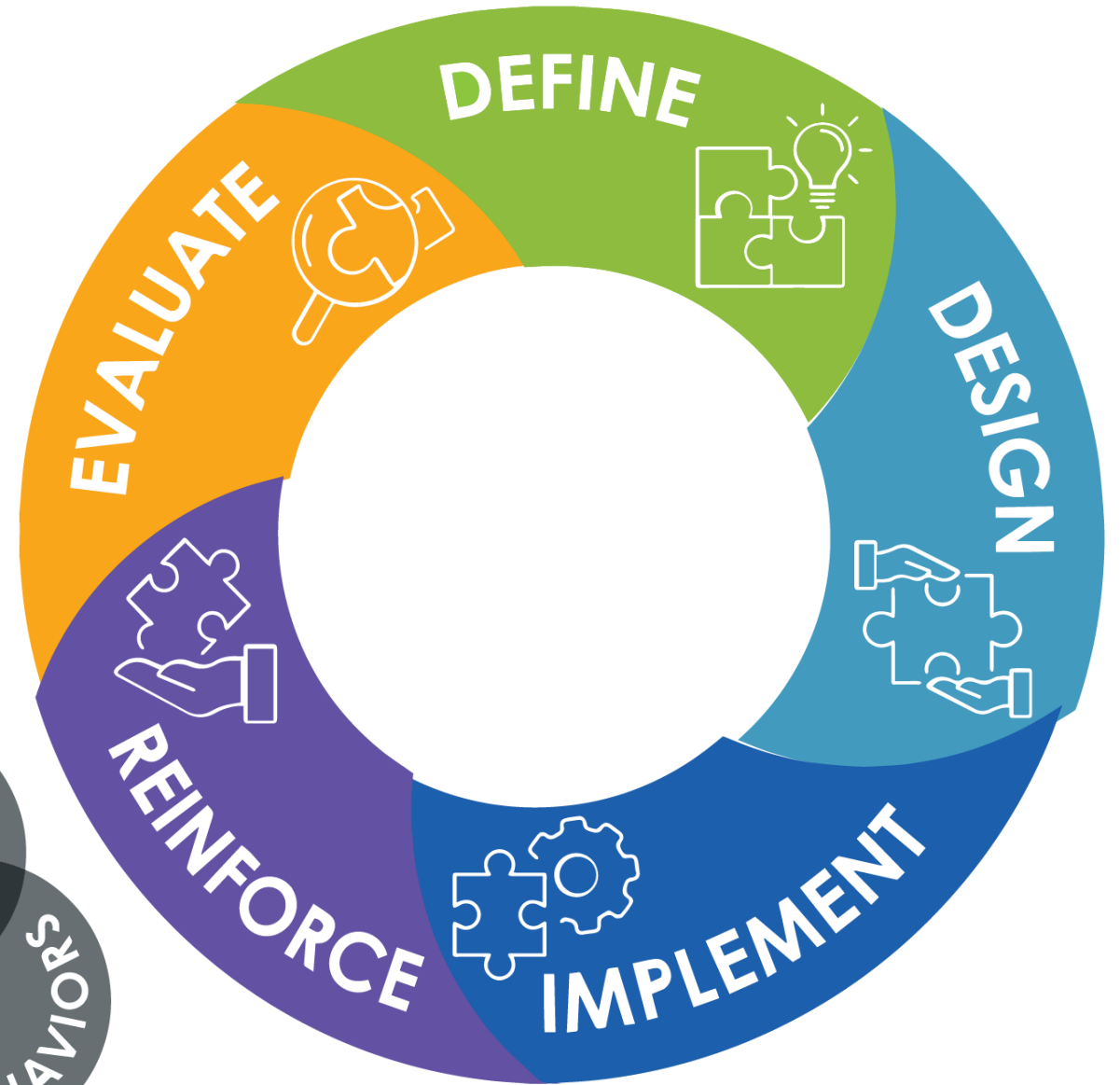


- 10. Refine, standardize, and stabilize the process.
- 11. Monitor process performance.
- 12. Evaluate results; share learnings.

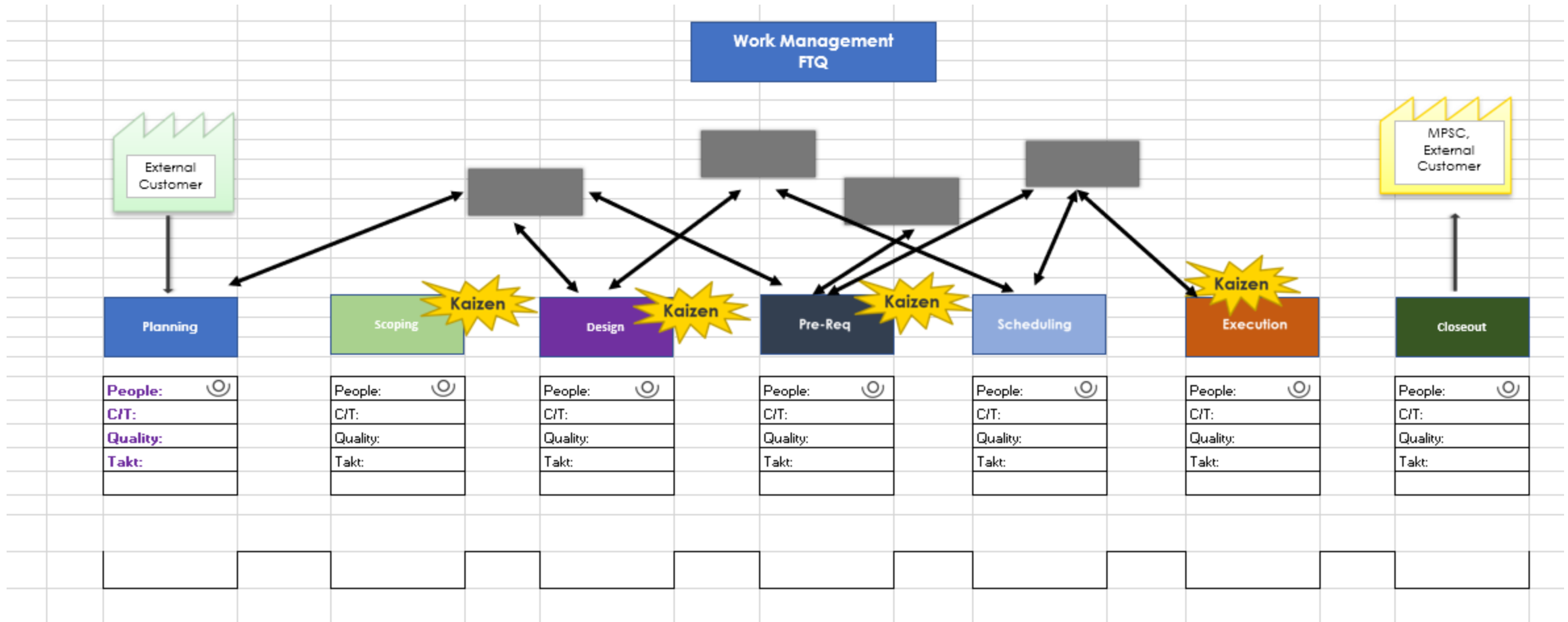


Determine if the change achieved the success measures.  
Understand what went well and what could have gone better.

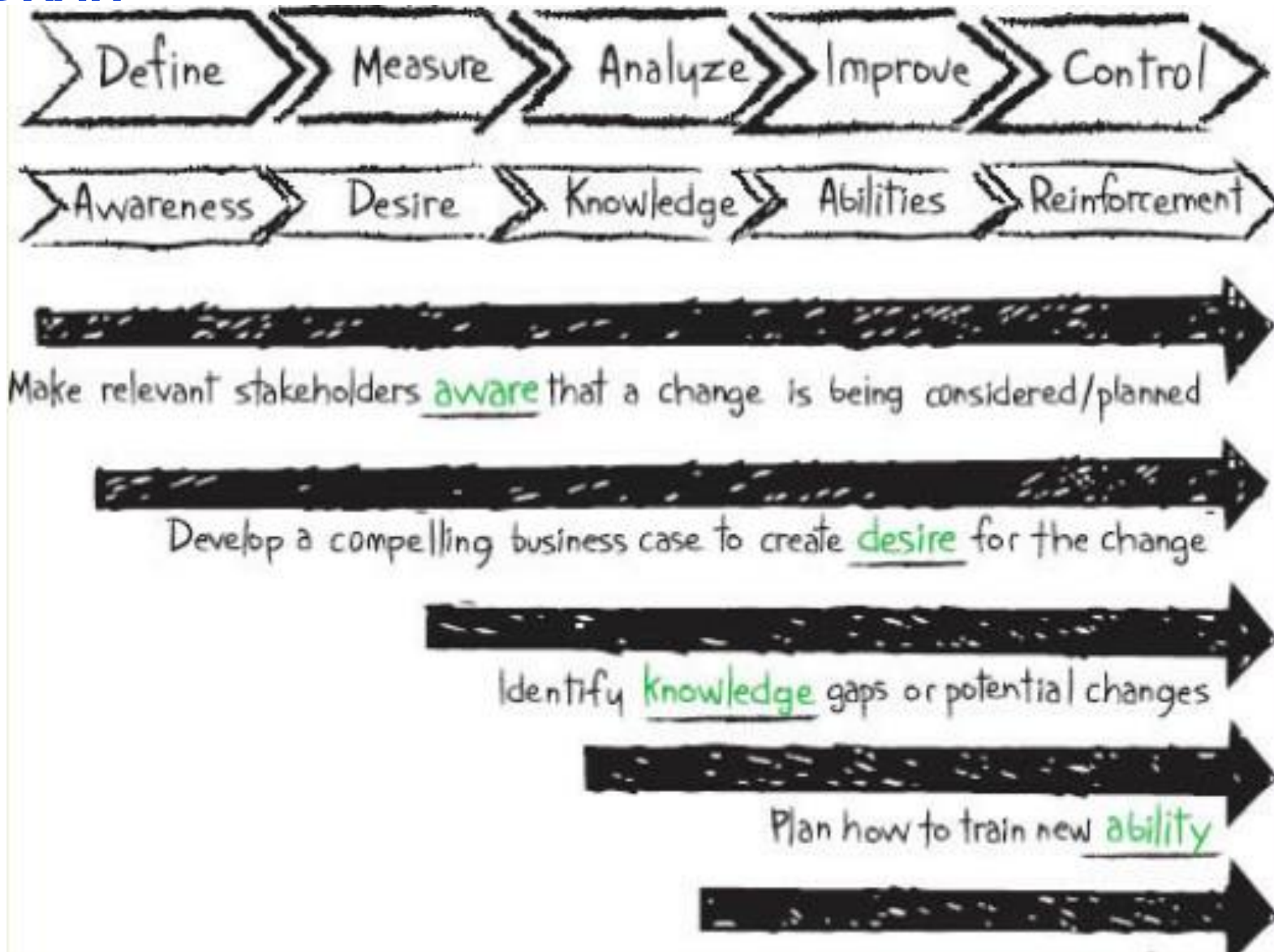
# Bringing it all together



# Example



# DMAIC and ADKAR

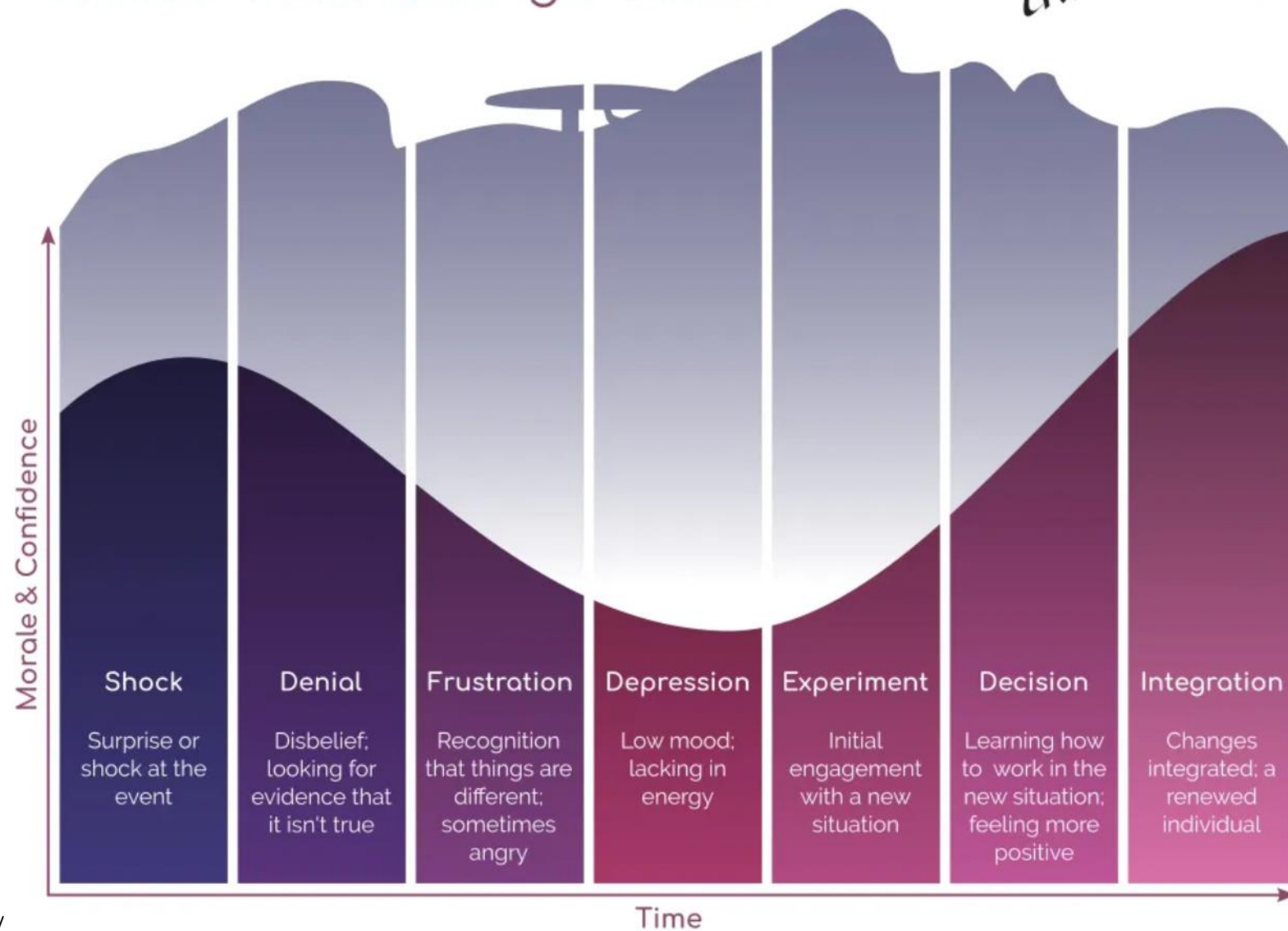


**Tools to help you embed  
Change Management  
Into your  
Continuous Improvement  
Initiatives**

# Change Curve

## Kübler-Ross Change Curve<sup>®</sup>

EKR Elisabeth Kübler-Ross  
FOUNDATION



<https://www.ekrfoundation.org/5-stages-of-grief/change-curve/>

Change Phase	Tools					DMAIC Phase	Tools				
<b>Define</b>	Change Summary	Change Resources (people)	RACI	Success Checklist		<b>Define</b>	Project Charter	Voice of Customer	Value Stream Map		
<b>Design</b>	Stakeholder Analysis	Stakeholder Engagement	Change Plan	Success Checklist		<b>Measure</b>	Process Map	Capability Analysis	Pareto Chart		
<b>Implement</b>	Change Plan	Stakeholder Engagement		Success Checklist		<b>Analyze</b>	Root Cause Analysis	Failure Mode and Effects Analysis	Multi-vari chart		
<b>Reinforce</b>	Change Summary	Stakeholder Analysis	Stakeholder Engagement	Change Plan	Success Checklist	<b>Improve</b>	Design of Experiments	Kaizen Event			
<b>Evaluate</b>	Change Summary	Change Plan	Lessons Learned	Success Checklist		<b>Control</b>	Control Plan	Statistical Process Control	5S	Mistake proofing (poka-yoke)	

# Change Summary

Change Summary	
INSTRUCTIONS LINK	
Project Name:	Date:
The Change	
Describe the current state and the challenge(s) you are experiencing.	
What does the future state look like?	
Why is this change required?	
As a result of this change, what will be different for the people? (e.g., roles, beliefs, behaviors, actions, processes, policies, technology, tools, measures).	
What is out of scope for this change? (Refer back to the first two questions.)	

## Stakeholders

Which stakeholders will be advocates and which could be tougher to convince?

--

## Risks

What are the risks associated with defining, designing, and implementing this change? (e.g., limited resources, conflicting organizational priorities, regulations, etc.)

--

What would occur if this change fails?

--

## Budget (Resources and Dollars)

How will the change management resources (e.g., change champion, communications, L&D) and expenses be funded (O&M or Capital)?

--

## Success Criteria

What criteria will indicate the measure of the change people need to exhibit? (e.g., level of adoption, evidence of new behaviors, return on people investment.)

--

How will the criteria be measured to identify the change was successful?

--

# Kotter's 8-Steps

Step	Action	New Behavior
1	Increase urgency	People start telling each other. "Let's go, we need to change things!"
2	Build the guiding team	A group powerful enough to guide a big change formed and they start to work together well.
3	Get the vision right	The guiding team develops the right vision and strategy for the change effort.
4	Communicate for buy-in	People begin to buy into the change, and this shows in their behavior.
5	Empower action	More people feel able to act, and do act, on the vision.
6	Create short-term wins	Momentum builds as people try to fulfill the vision, while fewer and fewer resist change.
7	Don't let up	People make wave after wave of changes until the vision is fulfilled.
8	Make change stick	New and winning behavior continues despite the pull of tradition, turnover of change leaders, etc.

# Switch

## HOW TO MAKE A SWITCH

For things to change, somebody somewhere has to start acting differently. Maybe it's you, maybe it's your team. Picture that person (or people).

Each has an emotional Elephant side and a rational Rider side. You've got to reach both. And you've also got to clear the way for them to succeed. In short, you must do three things:

### DIRECT the Rider

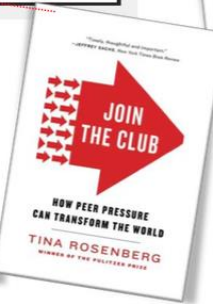
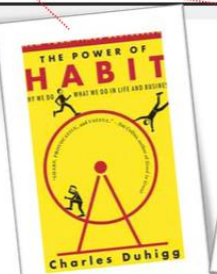
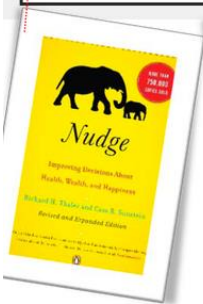
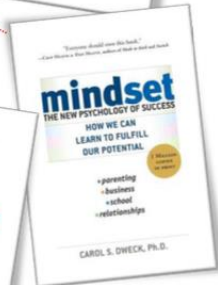
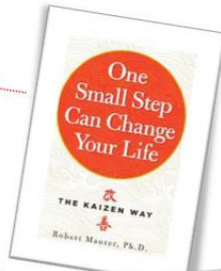
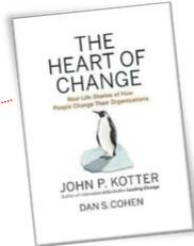
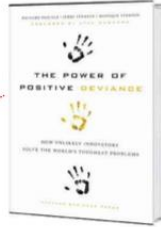
- FOLLOW THE BRIGHT SPOTS.** Investigate what's working and clone it. [Jerry Sternin in Vietnam, solutions-focused therapy]
- SCRIPT THE CRITICAL MOVES.** Don't think big picture, think in terms of specific behaviors. [1% milk, four rules at the Brazilian railroad]
- POINT TO THE DESTINATION.** Change is easier when you know where you're going and why it's worth it. ["You'll be third graders soon," "No dry holes" at BP]

### MOTIVATE the Elephant

- FIND THE FEELING.** Knowing something isn't enough to cause change. Make people feel something. [Piling gloves on the table, the chemotherapy video game, Robyn Waters's demos at Target]
- SHRINK THE CHANGE.** Break down the change until it no longer spooks the Elephant. [The 5-Minute Room Rescue, procurement reform]
- GROW YOUR PEOPLE.** Cultivate a sense of identity and instill the growth mindset. [Brasillata's "inventors," junior-high math kids' turnaround]

### SHAPE the Path

- TWEAK THE ENVIRONMENT.** When the situation changes, the behavior changes. So change the situation. [Throwing out the phone system at Rackspace, 1-Click ordering, simplifying the online time sheet]
- BUILD HABITS.** When behavior is habitual, it's "free"—it doesn't tax the Rider. Look for ways to encourage habits. [Setting "action triggers," eating two bowls of soup while dieting, using checklists]
- RALLY THE HERD.** Behavior is contagious. Help it spread. ["Fataki" in Tanzania, "free spaces" in hospitals, seeding the tip jar]



## DIRECT THE RIDER

### FIND THE BRIGHT SPOTS

•

### SCRIPT THE CRITICAL MOVES

•

### POINT TO THE DESTINATION

•

## SWITCH MOTIVATE THE ELEPHANT

### FIND THE FEELING

•

### SHRINK THE CHANGE

•

### GROW YOUR PEOPLE

•

## SHAPE THE PATH

### TWEAK THE ENVIRONMENT

•

### BUILD HABITS

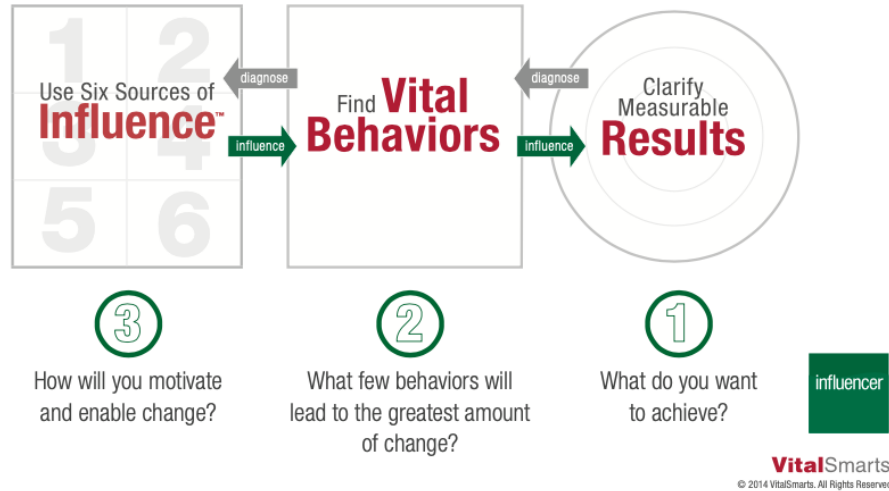
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### RALLY THE HERD

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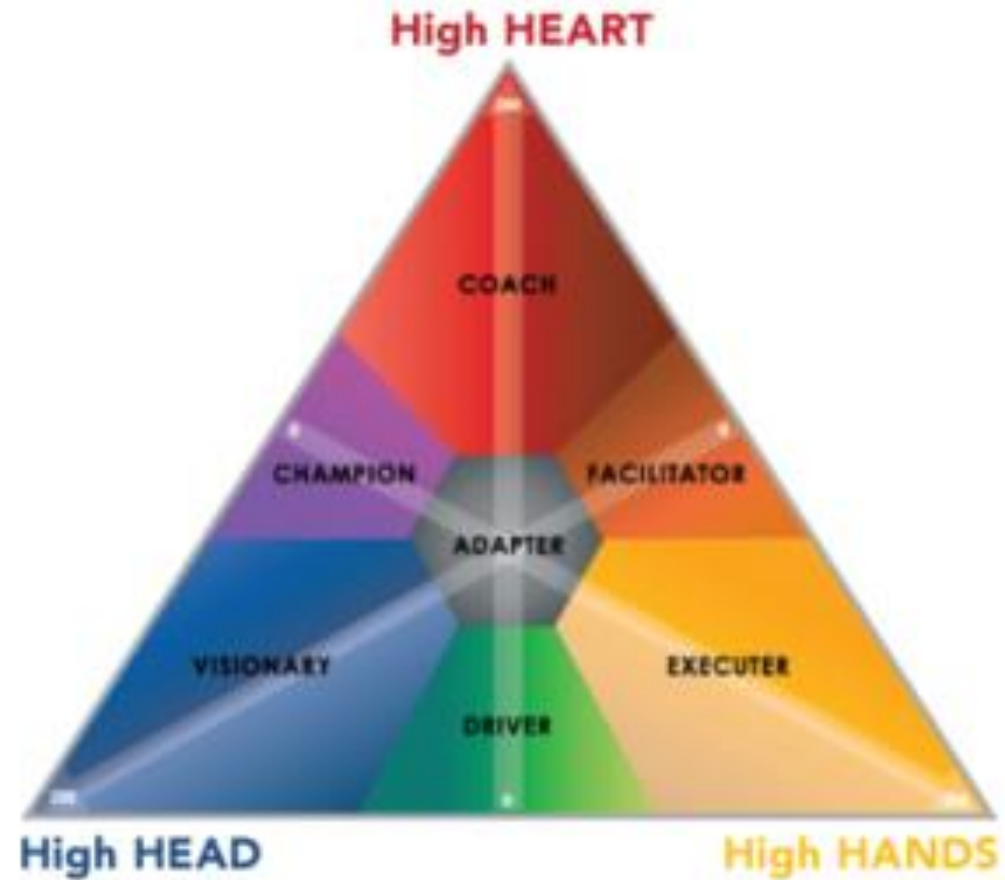
# Influencer

## Influencer Model

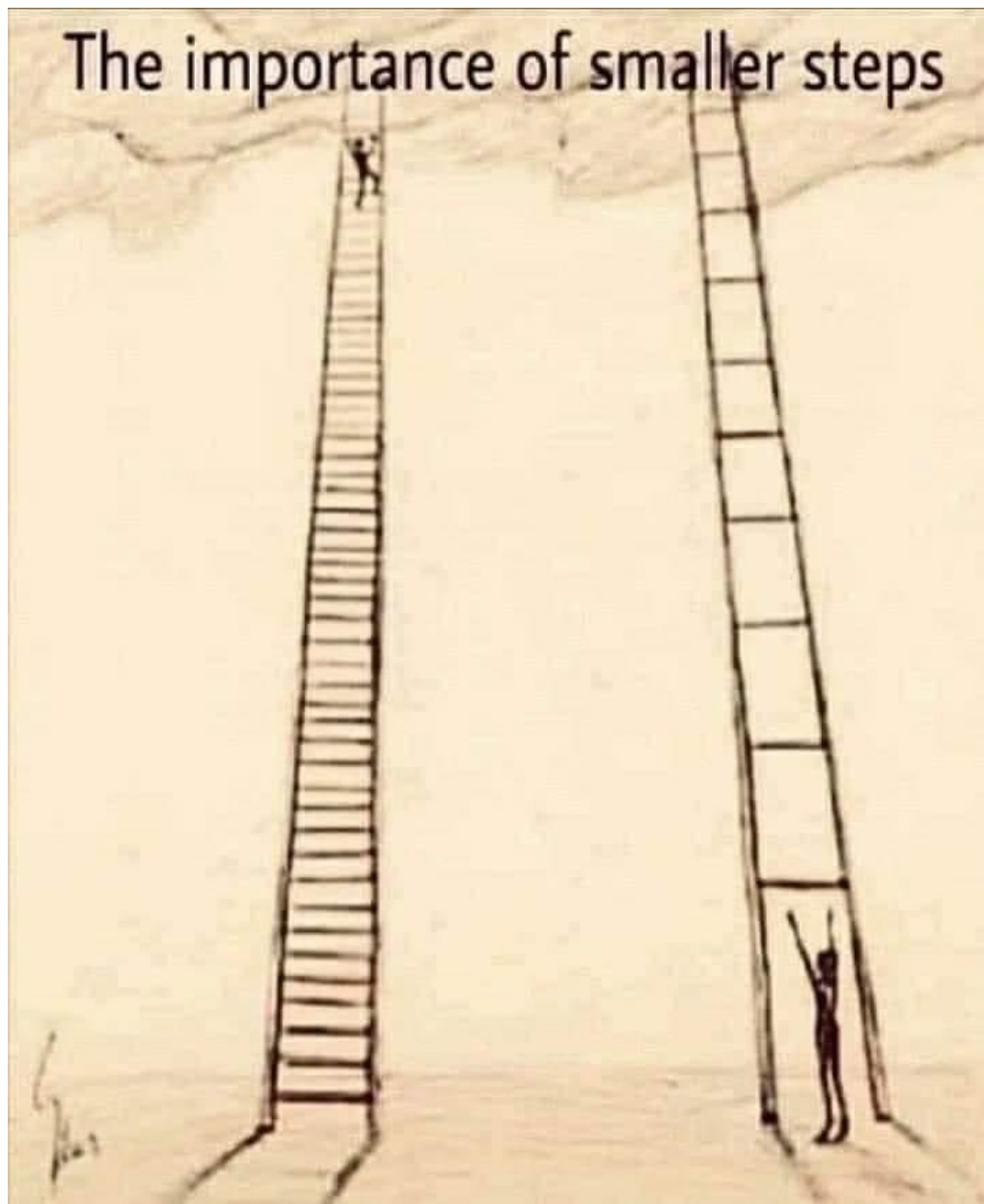


	Motivation	Ability
Personal	1 Make the Undesirable Desirable	2 Surpass Your Limits
Social	3 Harness Peer Pressure	4 Find Strength in Numbers
Structural	5 Design Rewards and Demand Accountability	6 Change the Environment

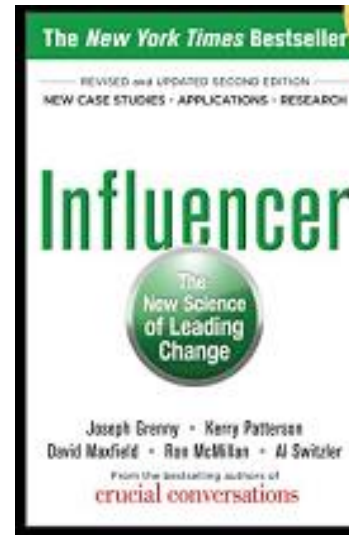
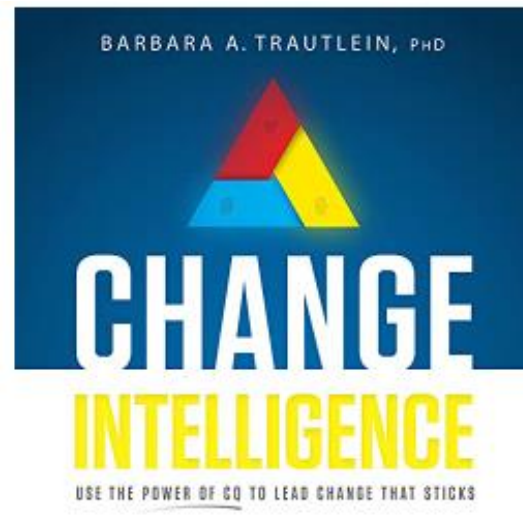
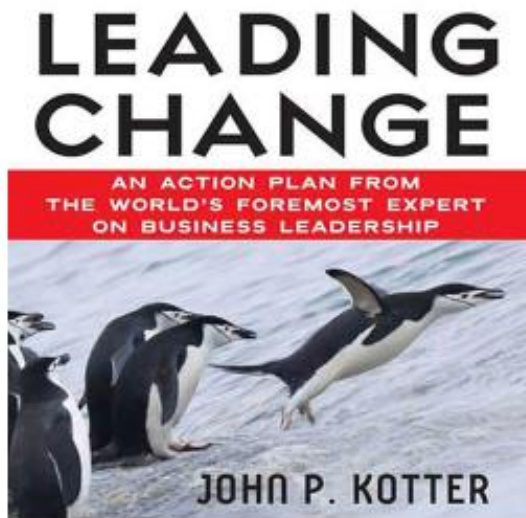
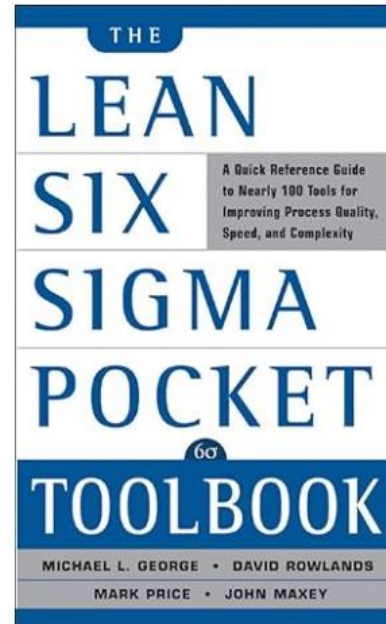
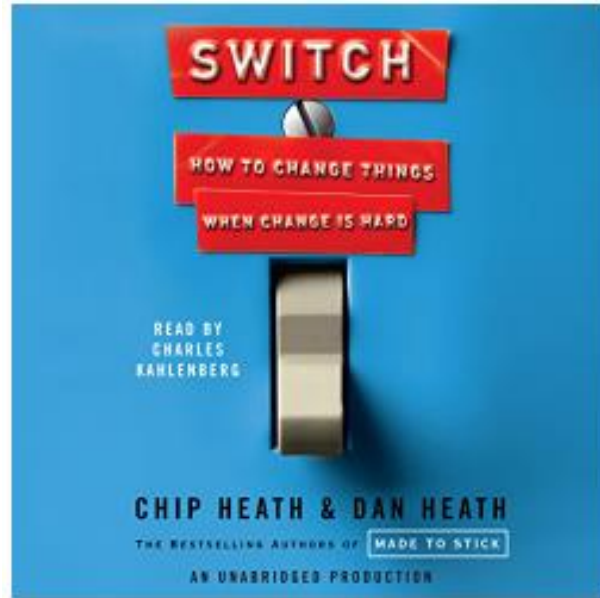
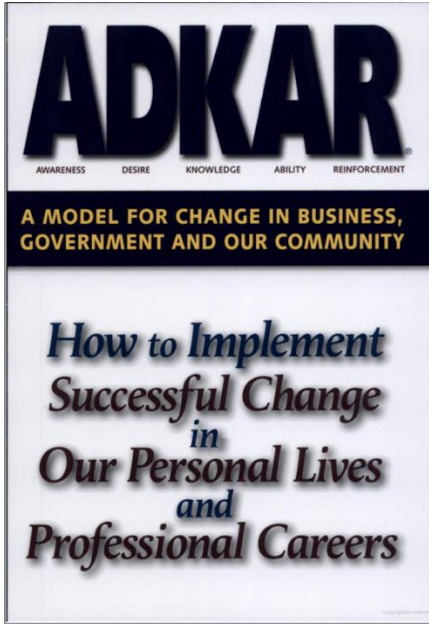
# Change Intelligence



## The importance of smaller steps



# Reference Books





# Let's Connect



<https://www.linkedin.com/in/melissa-sherman-02b49526/>

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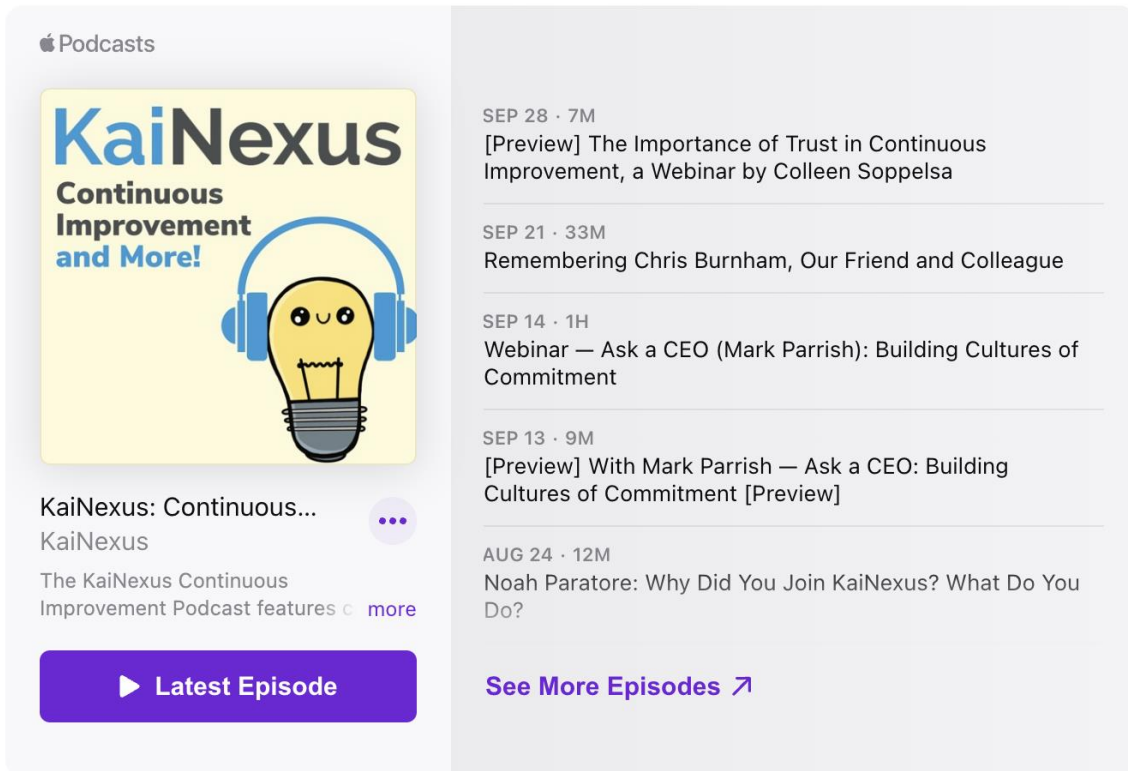
## Elevate Excellence: Unveiling 9 Quality Improvement Techniques

February 22, 2024

I often find myself falling into the common trap of believing that if something is worthwhile, it is necessarily difficult. I think we all...



# The KaiNexus Podcast



The screenshot shows the Apple Podcasts interface for the KaiNexus podcast. The main image features the text "KaiNexus Continuous Improvement and More!" above a cartoon lightbulb wearing headphones. Below the image, the text reads "KaiNexus: Continuous..." and "KaiNexus". A description states "The KaiNexus Continuous Improvement Podcast features c more". A purple button labeled "Latest Episode" is at the bottom left. On the right, a list of episodes is shown with dates and durations:

- SEP 28 · 7M [Preview] The Importance of Trust in Continuous Improvement, a Webinar by Colleen Soppelsa
- SEP 21 · 33M Remembering Chris Burnham, Our Friend and Colleague
- SEP 14 · 1H Webinar — Ask a CEO (Mark Parrish): Building Cultures of Commitment
- SEP 13 · 9M [Preview] With Mark Parrish — Ask a CEO: Building Cultures of Commitment [Preview]
- AUG 24 · 12M Noah Paratore: Why Did You Join KaiNexus? What Do You Do?

A link "See More Episodes ↗" is located at the bottom right of the episode list.

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