

TECH TRANSITIONS:

Managing Software Change

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Software Trainer



Modern
& Unified

ON THE
MOVE

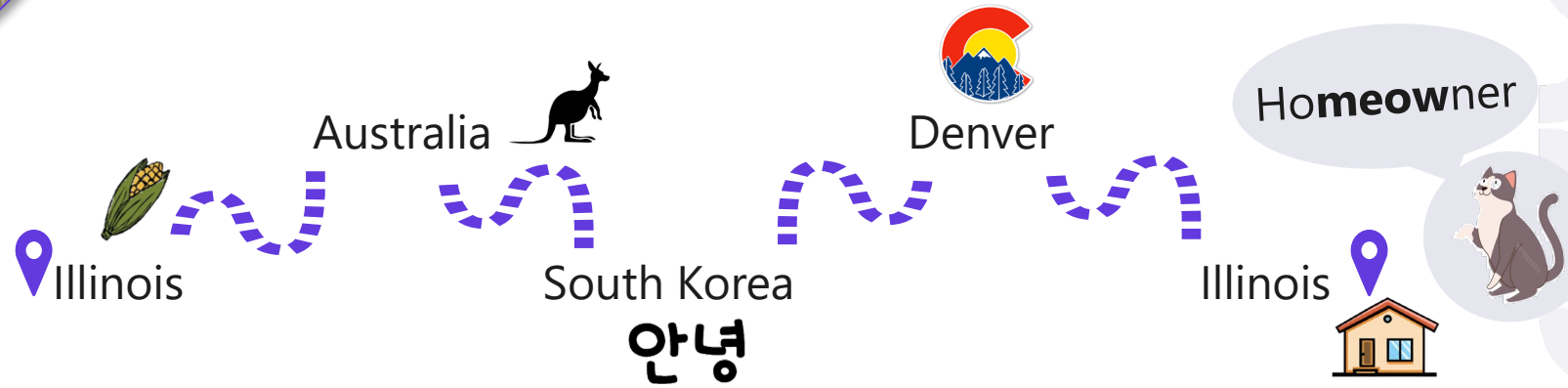
SCAN QR CODE FOR SURVEY



About Me



- Bridgeway BASYS Platform Trainer
- Background:
 - MBA, MS Management and Organizational Behavior
 - Certified Prosci Change Management Practitioner and Instructor
 - Microsoft Certified Trainer
- Passionate about empowering others to succeed
- World Traveler



Resources

- PMI – Project Management Institute
- Prosci – Change Management training





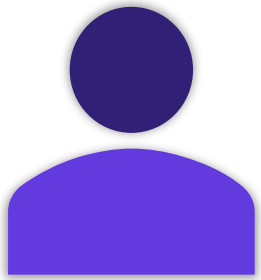
Take notes here!

Use these note pages in your handouts throughout the session to reflect on your own software change experiences.

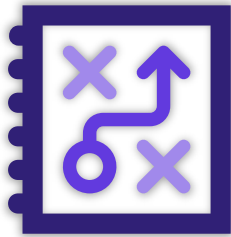
Introduction

Introduction

- In this one-hour interactive session, we will explore best practices for Managing Software Change. The session will cover three main topics:



Understanding
User Needs



Project Management
Techniques

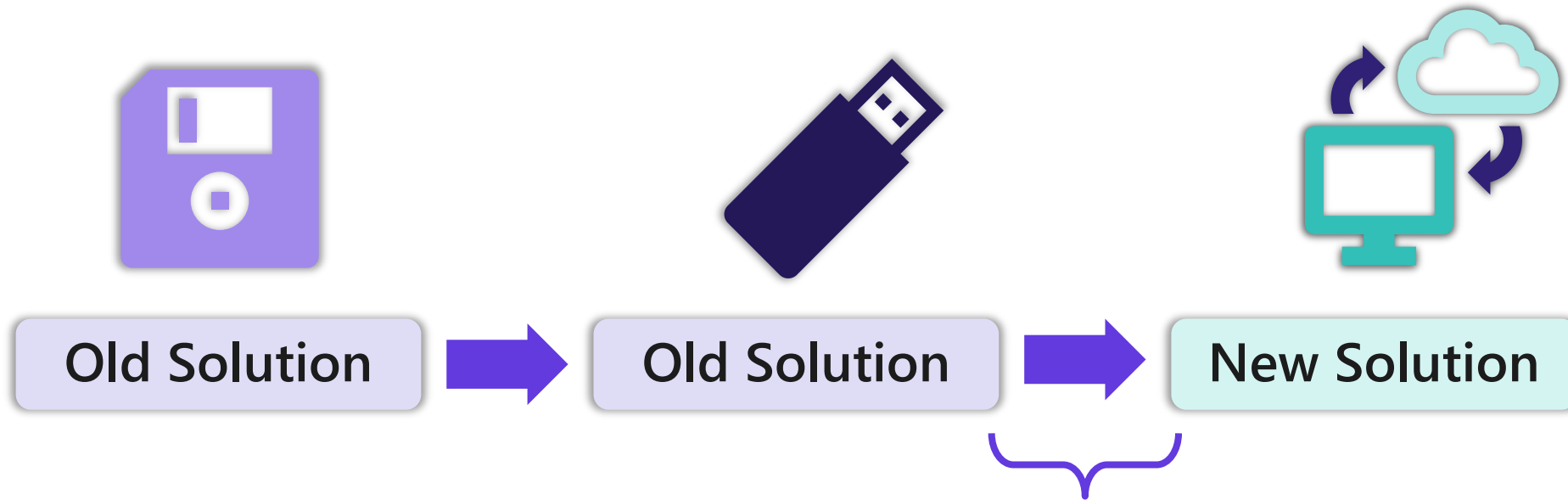


Change Management
Techniques

Software Change



Software Change



Software Adoption

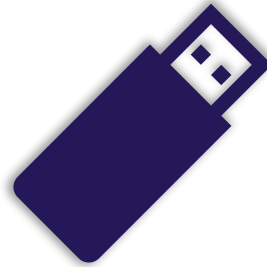
Process of integrating and effectively using new software to achieve desired business outcomes.

Benefits of Change



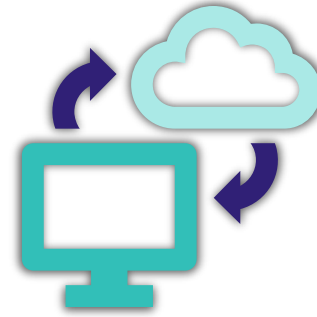
Old Solution

- Portability
- Physical Backup



Old Solution

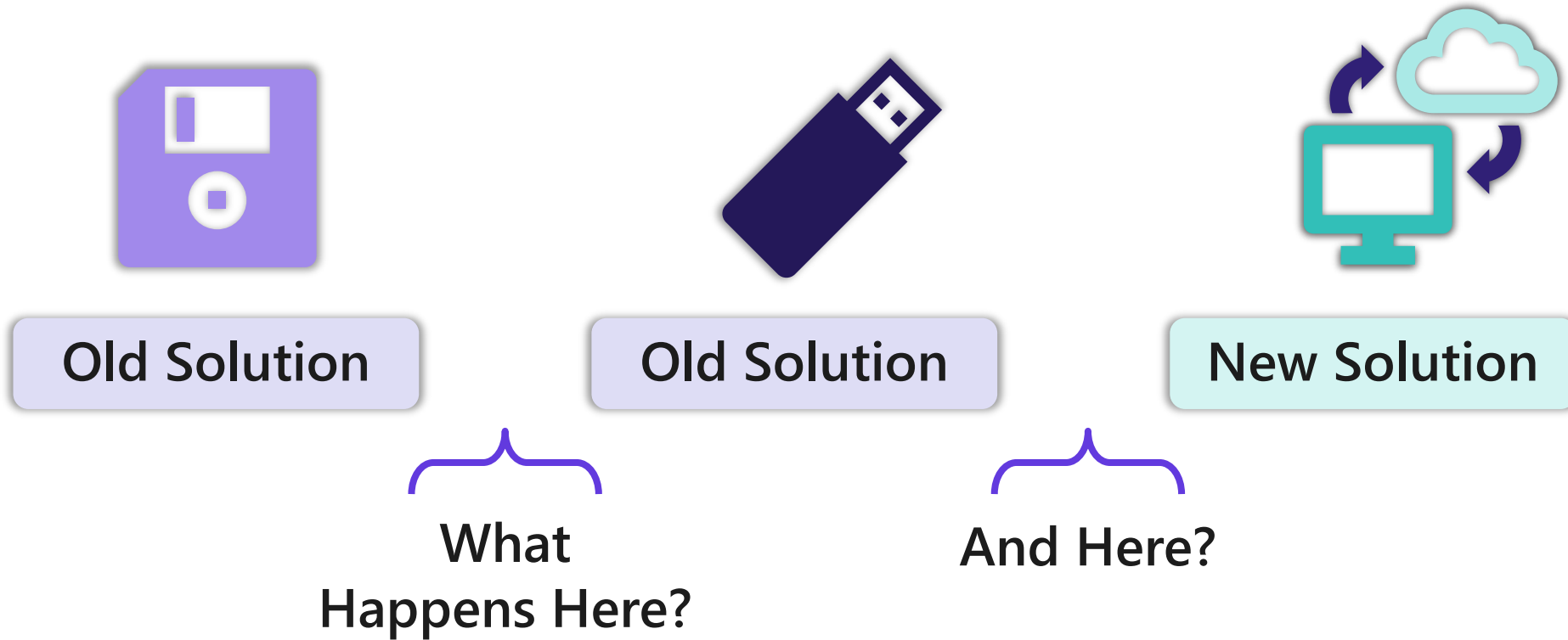
- High Capacity
- Speed
- Durability






New Solution

- Accessibility
- Scalability
- Collaboration
- Security

Software Change

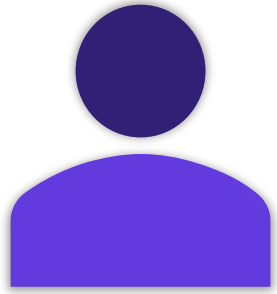


The Struggle is Real

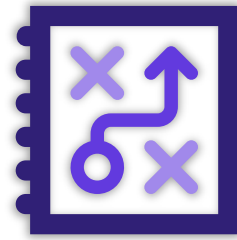
Software Adoption Challenges		
 Poor User Experiences	 Undefined processes	 Resistance to change
88% of employees frequently face frustration with software at work	53% of employees are unclear who is responsible for successful adoption	30% of organizations identify a digital skills gap among employees as a significant barrier

Source: Userlane State of Digital Adoption Report 2022

Resolving the Challenges



Understanding
User Needs



Project Management
Techniques



Change Management
Techniques



How does your organization currently handle:
Understanding user needs?
Project management?
Change management?

Understanding User Needs



How to Understand User Needs



- **Ask questions** - Engage users to uncover pain points and goals



- **Be real** - Resolve pain points realistically



- **Empathy** - Step into the user's shoes to understand their experience

Gain Understanding by Asking Questions



Users

Who are your users/key stakeholders?



Obstacles

What obstacles can you predict?



Solutions

How can you remove those obstacles for your users?

Resolving Pain Points Realistically

Plan for training

Set realistic expectations

Provide support resources

Identify specific resources designated for support

Adjust workflow expectations

Acknowledge that productivity may dip during adoption and plan accordingly

Use Empathy



- **Acknowledge** challenges



- **Listen** to concerns



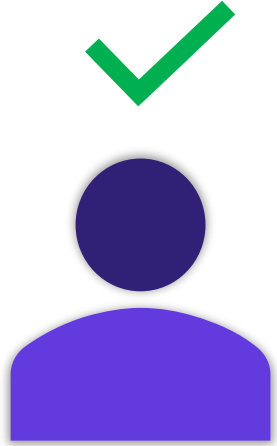
- **Recognize** the unique experiences of your team



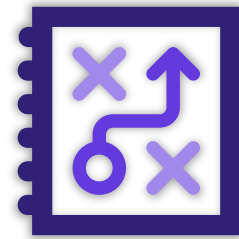
- **Channel** Mellissa's grandmother



Resolving the Challenges



Understanding
User Needs



Project Management
Techniques

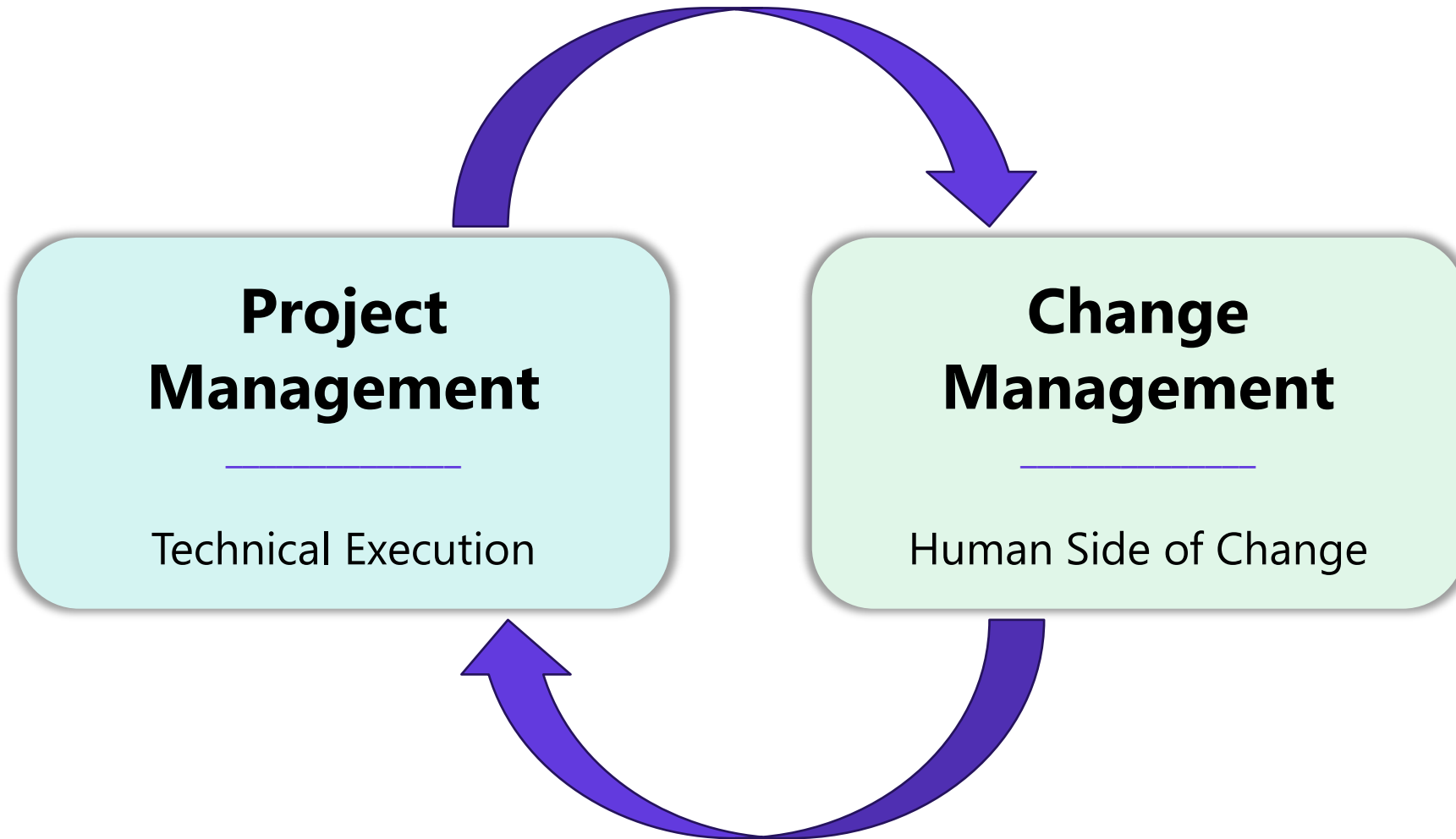


Change Management
Techniques



What can you do to improve how you address user needs?

Project Management vs. Change Management



Project Management

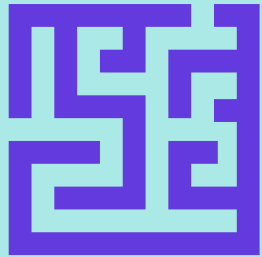


Project Management

- What is it?
 - The practice of planning, organizing, and executing the tasks needed to meet project requirements. – Project Management Institute
- Metrics of success:
 - On budget
 - On time
 - Rate of attrition
 - Employee satisfaction
 - Project achieves desired results

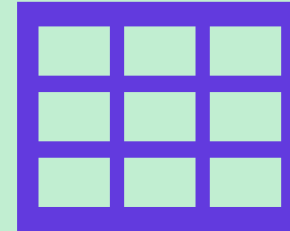
Techniques

Critical Path Method



RACI Matrix

(Roles & Responsibilities Chart)

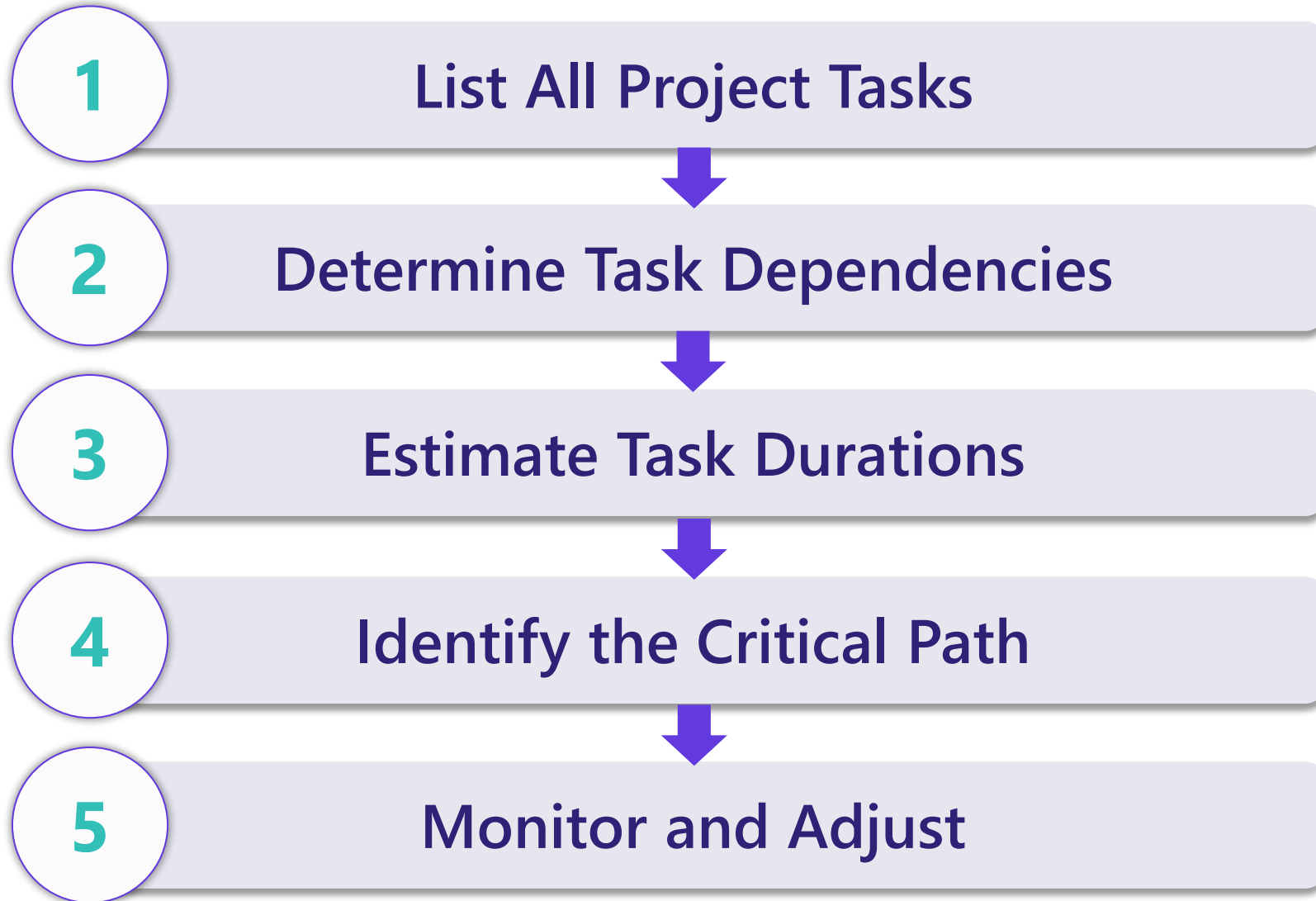


Critical Path Method

- What is it?
 - Used to determine the longest sequence of dependent tasks that dictate the project's shortest possible duration
- How does it help?
 - Prioritize tasks
 - Allocate resources efficiently
 - Anticipate potential delays



Critical Path Method



RACI Matrix (Roles & Responsibilities Chart)

- What is it?
 - A project management tool used to clarify roles and responsibilities in a project or process

RACI Definitions	
(R) Responsible	The group who is responsible for the activity execution
(A) Accountable	The group who is ultimately held accountable for the overall success of the activity
(C) Consulted	Group that provides input to a project activity
(I) Informed	Group that is informed of the progress and outcomes of a project activity

How Does RACI Help?

Clarifies Roles

Improves Communication

Increases Accountability

Enhances Efficiency

Supports Project Management

RACI Work Order Example

High-Level Project Responsibilities	Bridgeway	Customer
Customer Requirements <ul style="list-style-type: none">• Business & operations• Data	R R	A, R A, R
High-Level Solution Design	A, R	R
Detailed Solution Design + Build <ul style="list-style-type: none">• Configuration• Technical development	A, R A, R	C, I C, I
Data Conversion <ul style="list-style-type: none">• Data mapping• Data loading & validation	A, R A, R	R, C R, C
Testing and Validation <ul style="list-style-type: none">• Configuration• Workflow UAT / Outcome-based• End-to-End	A, R A, R C, I	C, I R A, R

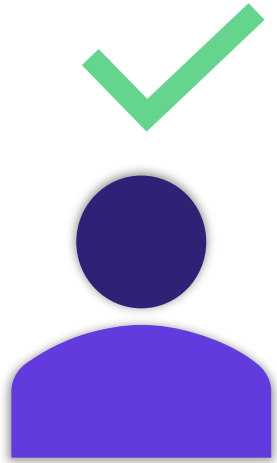
How do RACI and Critical Path Help together?

	RACI	Critical Path
On Budget	Defines Budget Responsibility	Optimizes Resources
On Time	Clarifies Task Ownership	Identifies Critical Tasks
Rate of Attrition	Reduces Confusion and Stress	Reduces Delays, Preventing Burnout
Employee Satisfaction	Boost Engagement and Morale	Predictable Timelines Lower Stress
Project Achieves Desired Results	Ensures Accountability and Alignment with Goals	Focuses on Key Tasks

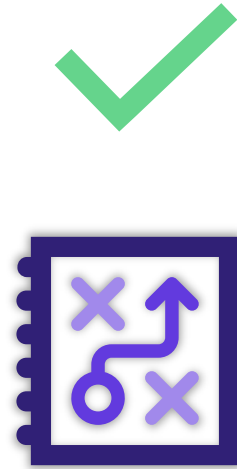


How could the Critical Path method and/or RACI benefit your organization or workgroup?

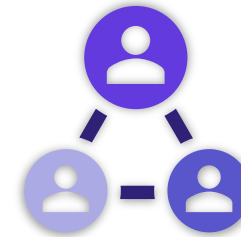
Resolving the Challenges



Understanding
User Needs



Project Management
Techniques



Change Management
Techniques

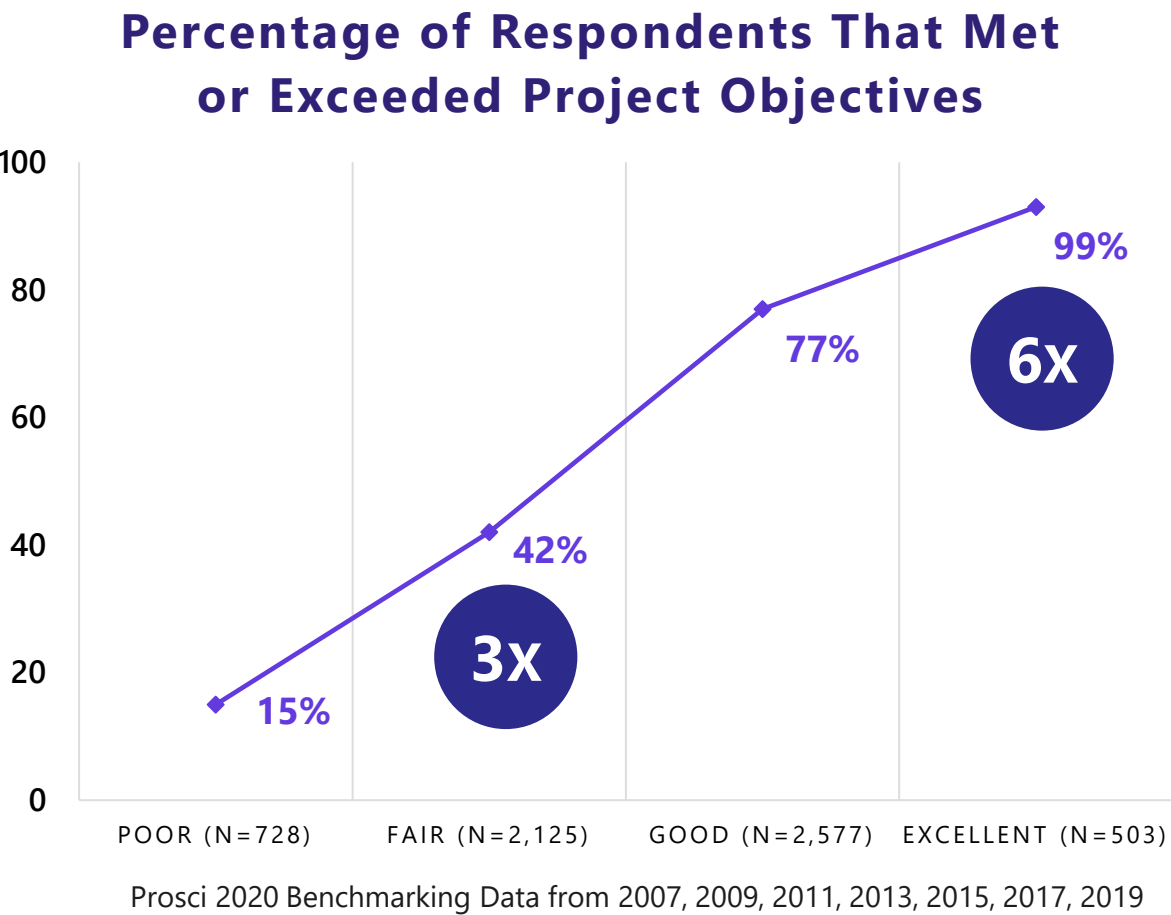
Change Management



Change Management

- Guides how we prepare, equip and support individuals to successfully adopt change to drive organizational success and outcomes. It encompasses:
 - Identifying stakeholders
 - Communication
 - Addressing resistance
 - Providing training and support
 - Evaluating outcomes

Primary Reasons for Applying Change Management



Manage
Employee Resistance
to Change



Increase
Probability of
Project Success

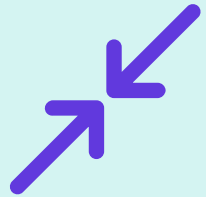


Capture
People-Dependent
ROI



Build
Change Competency
Into The Organization

Change Management Techniques



Addressing Resistance through ADKAR



Making Your Communication Plan

ADKAR

- What is it?
 - A change management model that guides individuals through the process of change
- How does it help? Overcome resistance to change by:
 - Structured approach
 - Focus on individuals
 - Improved experience
 - Measurable progress



What is ADKAR?

A

Awareness of the need for change

D

Desire to participate and support the change

K

Knowledge on how to change

A

Ability to demonstrate new skills and behaviors

R

Reinforcement to sustain the change

What we hear

A

"This is a waste of time"

"It was working just fine before"

D

"I'm not interested in changing"

"They're never serious about this stuff"

K

"Training is always a joke here"

"I'll just ask someone else to do it for me"

A

"They have to tell me the same thing all the time"

"It takes me so much longer to get it right"

R

"I'm just going to keep using my way"

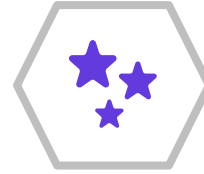
"I just forget the new way"

Strategies for managing resistance



Listen and understand objections

In many cases, employees simply want to be heard



Show benefits in a real and tangible way

Seeing is believing – show case studies or successful pilot programs



Remove Barriers

Barriers may relate to personal issues. Differentiate resistance from barriers.



Convert the strongest dissenters

Use special interventions and dedicated attention



Provide clear choices and consequences

Put ownership and control back into the hands of employees



Provide Incentives

Incentives can be good motivators and demonstrates you are invested in the success of the project

Communication

- What is it?
 - Imparting information where the *intended* message is understood by the recipient as *intended*
 - Also: both people walk away from the conversation understanding the same thing

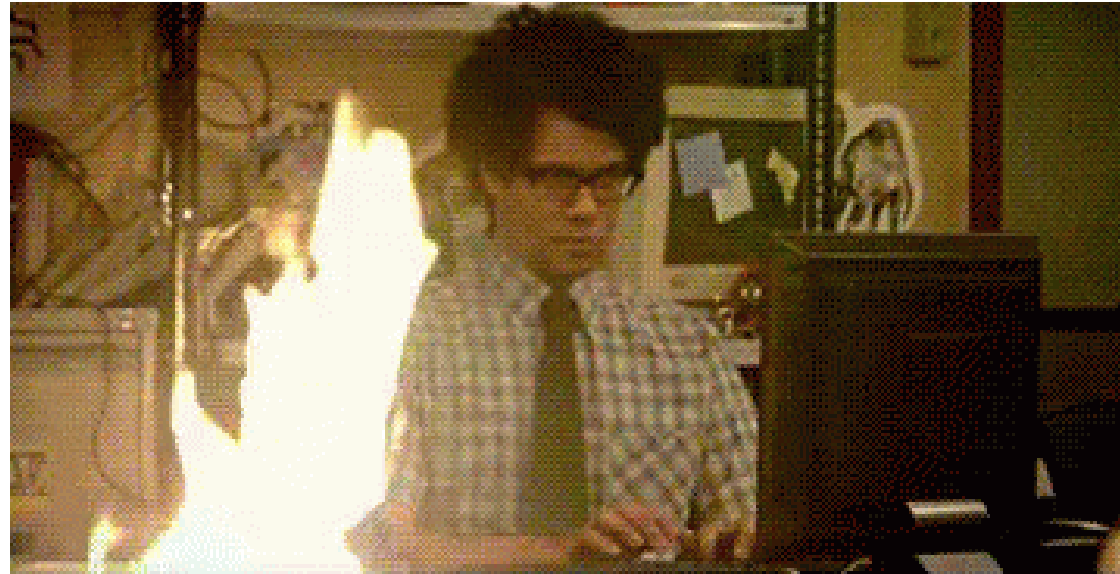
Popcorn anyone?



What Not to Do

"Big changes coming Monday. Hope you like surprises."

- Result: Employees panic, stockpile coffee, and prepare for the inevitable tech meltdown



Make Your Plan

- **Identify Preferred Senders**

- Determine who should deliver messages (e.g., senior leaders for business impact, managers for personal impact)

- **Define Key Messages**

- Use ADKAR to ensure relevance

- **Plan Message Delivery**

- Ensure key messages are repeated 5 – 7 times

- **Monitor and Adjust**

- Adjust messaging based on employee responses and engagement



What are some pain points you've experienced during change?

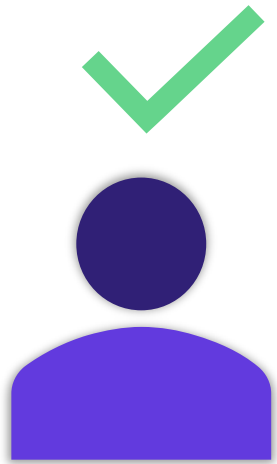
How can you alleviate these pain points in your office?

Conclusion

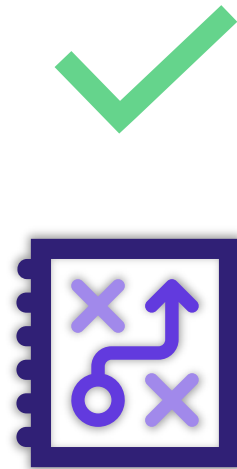


Conclusion

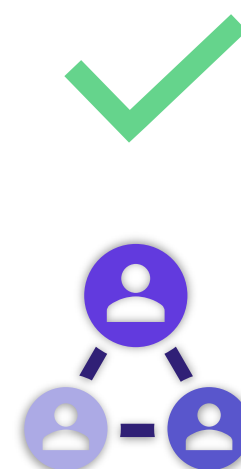
We explored these best practices for Managing Software Change:



Understanding
User Needs



Project Management
Techniques



Change Management
Techniques



Final Notes

Tech Transitions: Managing Software Change

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2025
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post-session
feedback:

