

Change Management: What's In Your Toolkit?

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How do you manage change? Business consultant Fred Nickols finds that most manage change “the same way you’d manage anything else of a turbulent, messy, chaotic nature; that is, you don’t really manage it, you grapple with it. It’s more a matter of leadership ability than management skill.”

While management skills are important to keep order to a change initiative, the most important skill needed to get through change is leadership.

Change Management Defined

There are as many definitions of change management as there are management gurus, which makes it difficult to know which change management perspective to adopt. However, everyone agrees that change management is a planned, coordinated systematic approach to dealing with change.

Planning, budgeting, and controlling are activities that are commonly associated with change management. Leadership skills, however, are key to keeping an organization’s transition on track. Good leaders provide strategic direction, inspire and motivate, and mobilize people and resources to reach a common goal and adapt to change effectively.

Leading Change

John Kotter, a Harvard Business School professor and expert in change management, studied organizations to better understand what makes them successful during times of change, especially transformative change. He observed that successful transformational change is a result of spending 70 to 90 percent of one’s time on leading and 10 to 30 percent on management activities. The need to be skilled in both management and leadership is important to get through any kind of change, regardless of whether one participates in change as a senior executive position, a manager, or a member of a project team.

Since most healthcare professionals are trained as managers, it’s common to spend more time managing change than leading. This can become a problem during large-scale change such as transitioning from paper to electronic health records. Resistance or complacency toward change can generally be addressed by exhibiting strong leadership skills.

The ability to inspire, motivate, and create urgency is not a management activity. Applying systematic and sometimes mechanical approaches will miss the point when the source of a problem is human in nature rather than technical or logistical.

Leadership inspires the heart and mind, while management provides a necessary framework to organize change in processes and tasks. It’s important to know when one is needed more than the other. Knowing which tool to pull out of the toolkit is critical for an effective change agent.

The Change Management Toolkit

A change leader’s toolkit includes a variety of resources such as change models, tactics, templates, techniques, and problem-solving tools. Because of their job function, change leaders may be required to spend more time managing than leading. Often this is the case for middle managers or project team participants. However, it is still important for these professionals to understand the difference between leading and managing and to be able to recognize when leadership skill is needed. Everyone involved in a change project must be versatile enough to move between these two skills.

Developing a toolkit is often a matter of scanning the change literature and determining what makes sense for the given work environment. In some cases, a change management philosophy already exists within an organization and toolkits are a combination of project management tools, templates, procedures, and strategies for achieving desired change. Strategies such as Kotter's eight-step process for change provide a series of steps broader in scope than project management. Successful change leaders set the direction, get the right people involved, get the vision right, and motivate people throughout the organization to overcome their inertia or their fears of taking action. They inspire people to grow and to take personal and professional risks, aligning people and rewards and incentives.

Perhaps one of the most important tools in a change agent's toolkit is the ability to manage one's own anxiety and reactivity to others while leading change. Change leaders can fail despite the use of their best tools and strategies by being emotionally reactive while using them. Think about the leaders and managers you know. Which ones are you more likely to follow? A leader with a calm presence is attractive to others and keeps the system calmer.

An Area of Professional Practice?

The notion that change management is a body of knowledge or area of professional practice is an emerging theme among some change management experts. From the people issues that seem to comprise much of the change challenge to the logistics of change projects themselves, leading change requires knowledge on a variety of topics and practices.

The content of change management is drawn from a number of disciplines, including business administration, leadership, project management, psychology, behavioral science, and the study of systems and organizational behavior. To be certain, change management cannot solely be viewed as a set of processes and logistics. To do so would leave the human aspects of change out of the equation. Anyone who has been involved in a change project realizes that the minds and hearts of those we lead do not always follow the timeline of a project plan. It's much more complex than that.

Viewing change management as an area of professional practice is an important concept for HIM leaders and managers. So is expanding the definition of change management to include a number of disciplines. Career success depends on how well one adapts to change either as a leader or a participant. Both require an understanding of change management and a solid toolkit.

Resources for Managing Change

Margret Amatayakul's article "Teamwork: Structure and Roles of the EHR Project Team" (*Journal of AHIMA* 75, no. 4 (2004): 44–46) specifically addresses EHR project team building. It also reiterates the five stages of group development.

William Bridges' book *Managing Transitions: Making the Most of Change* (2d ed. New York, NY: Perseus Books Group, 2003) is a practical guide to dealing with the human side of organizational change. Bridges points out exactly how change affects employees in the midst of change and how employees in transition affect the organization. He offers suggestions to minimize the distress and disruption of change.

Dan S. Cohen's book *The Heart of Change Field Guide* (Boston, MA: Harvard Business School Press, 2005) is a companion resource to John Kotter's *Heart of Change* (see below). The field guide includes tools, templates, advice, and a framework for implementing Kotter's eight-step change process.

Leslie Fox's 2002 AHIMA conference presentation "The Art of Using Change Management to Lead Successful Projects" (available in the FORE Library: HIM Body of Knowledge at www.ahima.org) offers several examples of why projects succeed and fail. Fox makes a strong case for the leadership needed to lead successful change in projects and offers suggestions for self-guided learning to assist professionals in the midst of change.

In *The Heart of Change* (Boston, MA: Harvard Business School Press, 2002), John Kotter identifies common mistakes made by leaders and managers managing organizational change. He suggests a practical eight-step process to overcome barriers and achieve success.

The Team Handbook (3d ed. Madison, WI: Oriel, 2003) by Peter Scholtes, Brian L. Joiner, and Barbara J. Streibel is a virtual cookbook of methods for building strong teams and achieving superior results through those teams. The book offers clearly

described processes and steps for leading teams through change that can result in strong buy-in and support for projects or implementations that require cultural as well as procedural change.

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