

# 1 PLAN

After being hired, project planing begins or continues: timelines are created, methods & tools may be chosen, & the time to start defining implementation strategies through change management begins.

MANAGE THE CHANGE

## BE CONSISTENT

Establish consistency in methods, reporting (internally and for client), and platforms. (Plan training as necessary.)

## EVALUATE CULTURE

Asses the clients culture and readiness for change: Watch what they do over say. What do they value? Can they afford to fail? Is failure acceptable practice? Do they fear change? Why? Is there trust in leadership? What habits may support or inhibit change?

## INITIAL KICK-OFF EVENT

Be the first exposure for every-one in learning about the project to avoid negative effects from the 'anchoring' heuristic. Make sure the first things there hear about the project are positive.

## DEFINE GOALS

Clearly define your goals, purpose, and identity, sharing this information with the team to foster cohesion.

## SET EXPECTATIONS

Define roles and responsibilities while setting expectations.

## IDENTIFY SPONSOR(S)

Identify key contacts and key owner(s) for implementation of the design deliverable. The sponsor(s) could be different from those on your team and/or those who hired you.

## LISTEN

Especially given that much of the team may be completely new to the situation faced by the client, genuine listening, thoughtful questions, and critical analysis are key.

## MAP STAKEHOLDERS

Plot internal and external stakeholders, investigate their level of investment in the project, and seek out power dynamics to find potential hidden pitfalls. Invest in your allies and address challenges by those opposed.

## DISCOVER HISTORIES

Gently probe at the history of past projects to help anticipate stumbling-blocks and to better grasp power structures that underlie old operational models.

## BE TRANSPARENT

Carefully work to communicate about process, ethos, etc. Avoid overpromising to build trust.

# 2 RESEARCH

As the research plan is activated, there may be need to pivot or redefine, making communication vital.

MANAGE THE CHANGE

## REPORT BACK

Consistent and regular communication amongst the team and with stakeholders helps ensure buy-in during implementation.

## ACKNOWLEDGE HIERARCHY

Positional power through hierarchy is important to acknowledge to avoid conflict and to accumulate support.

## IDENTIFY RESOURCES

Assess the resources available to the project and who holds authority over these resources. Note and reframe plans based on the privilege and agency that comes from proximity to certain materials and non-material social ties.

## CONNECT

Make genuine connections and show kindness to others to possibly add sponsors or at least allies for the project.

## BUILD EXPERTISE

Cultivate and demonstrate expertise to build respect. There is power in being someone who is regarded as an expert.

# 3 BRAINSTORM

Once the bulk of the research is complete, the team moves onto divergent brainstorming with their new findings, evaluating opportunities.

MANAGE THE CHANGE

## ACCEPTABLE CHOICE

Only give clients choices that the team is willing to execute with passion, otherwise there is risk of discontent with the chosen path for the remainder of the project. Also, limit the choices that need to be made to avoid 'paralysis by analysis.'

## CULTIVATE UNIQUENESS

Offer updates to small groups or individuals that include subtle promotion of the unique value of your methodology and team.

## MANAGE CONFLICT

Identify the source and stage of the conflict, and remember to have empathy and avoid binary thinking as you choose the appropriate orientation and method for resolving the issue.

## REMEMBER

Consider who may lose power or how power may be redistributed with each potential design in order to anticipate and address resistance to change.

## CO-DESIGN

When appropriate, bring in stakeholders to help brainstorm, empathizing with their related challenges, and keeping their well-being top of mind.

## CREATE SPACE

Leave space for others' creative brainstorm, cultivate a safe environment to explore, and remember that silence is a powerful tool in negotiation or for seeing another's perspective.

# 4 CREATE & ITERATE

Post approvals, it is time to create. Prototyping, user-testing, & pilots may be used as iterations progress.

MANAGE THE CHANGE

## NEGOTIATE

Keep in mind the reasons behind resistance; negotiate for buy-in only when doing so won't compromise project goals.

## MULTIPLE STRATEGIES

Use multiple methods for working with stakeholders and for testing concepts to increase adaptability.

## WORK AROUND

Be aware of the 'omission bias' and avoid the trap. We often think leaving information out or no making new things is better than failing with something new. This fallacy can keep us from meaningful innovation.

## CRITIQUE IN PRIVATE

If a person is acting difficult, approach them in private with empathy an open mind to your own perspective being flawed.

## COMMUNICATE

Continually check in with team members to assess work loads and priorities especially between this project and other work. Provide support and advocacy when appropriate.

## INVOLVE IMPLEMENTERS

Assess who will use the design most to include them in testing.

## REPLACE OVER ELIMINATE

Habits are hard to eliminate but easier to replace, think of shifting behavior and systems by transitioning to something new rather than taking away. If a function is no longer needed, find a useful replacement.

## REOCCURRING RESPONSIBILITY

Regularly revisit these steps as this canvas highlights common trouble-spots.

## COMMUNICATE

Often and with clarity LISTEN

For mapping context, building trust, and building creativity

## MANAGE CONFLICT

With empathy CHANGE BEHAVIOR

Knowing habits INVOLVE CLIENTS To pass ownership

## IDENTIFY PRIVILEGE

To build equity DIVERSIFY

Strategies and team expertise/background to be adaptable

## PROACTIVELY PLAN

To innovatively thrive BUILD BRIDGES

To network resilience BE GRATEFUL To build relationships

# CHANGE MANAGEMENT IN DESIGN IMPLEMENTATION

As we follow the design process, we can find opportunities to manage change and facilitate design implementation in each phase.

# 5 PLAN

With the final design iteration approval, a new plan begins for the launch & tangible implementation.

MANAGE THE CHANGE

## CHECK-IN

Do not assume all sponsors and stakeholders are up to speed or still bought-in. Have one-on-one conversations to make them feel heard and to gauge their support for the project.

## PREPARE TO OVER PREPARE

People will almost always underestimate the time and needs for implementation. Avoid this 'planning fallacy' by over preparing.

## ASK FOR FAVORS

Give tasks to trustworthy sponsors and stakeholders. This helps with workload and creates investment in the project's success.

## ANNOUNCE

Surprises make people feel left out and vulnerable. Broadcast to a wide group about the kick-off.

## CLEAR INTENT

Guide implementers in specifying how they will execute their parts, to activate the 'implementation intent' heuristic.

## BUILD-IN FLEXIBILITY

Put in place evaluation steps for before and after the designer's involvement ends to build in adaptability and continued commitment to appropriate change.

# 6 LAUNCH

A successful launch is not without some fan-fare to mark a new start and bring all players on-board.

MANAGE THE CHANGE

## MAIN KICK-OFF EVENT

A kick-off event can inspire and engage all implementation related stakeholders even ones less involved in the design process. If previous belief in the project has been built, this event should be full of excitement.

## THANK THE TEAM

Be sure to thank the team and recognize everyone involved to increase positive feelings around the event, encourage reciprocity, ensure the potential of future work together, and to solidify association between the team and the project. Others need to know who to thank once the design succeeds.

## CONFIRM THE GOOD

Proposed change can be create defensiveness due to the 'confirmation bias.' Show how the new way is supported by existing values when possible.

## SPONSOR ON STAGE

The sponsor(s) should take center stage at the kick-off event. They will be the ones who keep the implementation going long term, so people should look to them as a leader.

## DON'T DOWNPLAY

Any conflict that arose during the project may still be fresh, tread lightly on residual emotions to prevent friction.

# 7 IMPLEMENT

The most tangible phase of design is not a given, so it should be carefully utilized.

MANAGE THE CHANGE

## TRAINING

Implementation must involve careful training of those who will be sponsoring and executing the project long-term. Ideally, most people have been updated gradually, but at this stage everyone should catch-up.

## BRIDGES NOT WEDGES

Avoid and look out for political games such as wedges between departments that could hinder implementation.

## CLARIFY THE END

Clarify the process for passing and project ownership to the client.

## PLANT SEEDS

If there are remaining ideas and if desired, invest some time in discussing potential future plans with decision-makers.

## FIND A WIN

Set up easy to reach goals and celebrate the early wins to encourage and motivate implementation.

## START EVALUATION

Host the first of a series of planned non-punitive evaluation and realignment meetings to help instill a culture of adapting and to evaluate the client's readiness continuing the change without intervention.

# 8 PASS

At the final stage of involvement, the designer must pass ownership of the design to the key sponsors in order to ensure long-term success.

MANAGE THE CHANGE

## STEP BACK

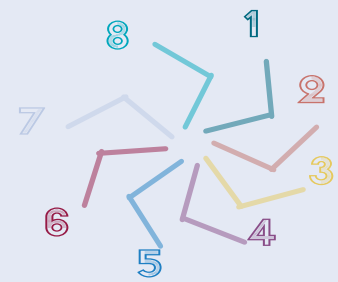
Hopefully, all the sponsor(s) and key users have begun to take charge of the continued implementation at this point. As the designer finishes the project, it is the beginning for others. Any final instructions for maintenance should be passed-on to ensure lasting success.

## PITCH

Pitch ideas for furthering the project or for other work with this organization if desired.

## ASSESS

Hold a wrap-up meeting with the client to access their learnings and where your process can improve. Before too much time passes, jot down lessons learned to avoid similar pitfalls and mistakes in the future.



Each project should lead into the next, further developing your change a skills on the continuum of design implementation.

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