



CHANGE MANAGEMENT AND RIM:
FITTING THE RECORDS PROFESSIONAL
INTO THE NEW MANAGEMENT DYNAMIC

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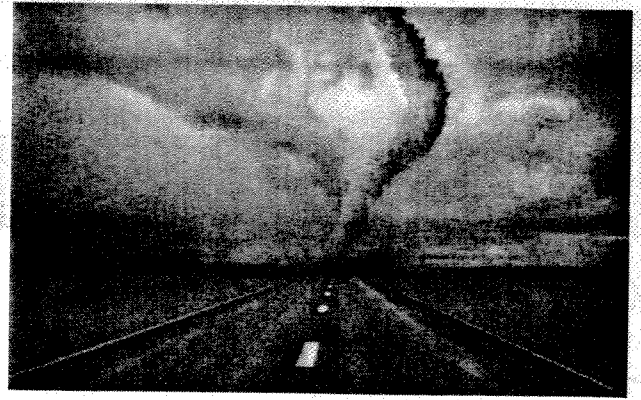
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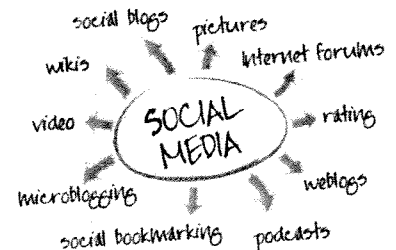
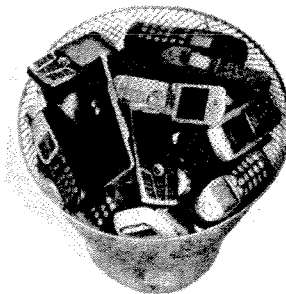
KEY NOTES



THE WINDS OF CHANGE

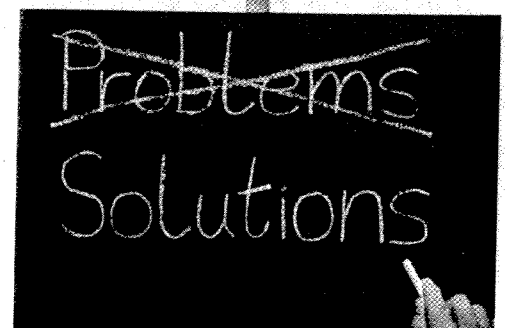


- ❖ TECHNOLOGY
- ❖ LAW & LEGISLATION
- ❖ FINANCIAL DISRUPTION
- ❖ GLOBALIZATION
- ❖ M&A
- ❖ RETIREMENT/NEW HIRE
- ❖ VACANCY / LEADERSHIP VOID
- ❖ NATURAL DISASTER
- ❖ DEMOGRAPHIC SHIFTS
- ❖ NEW BUSINESS MODEL (E-COMMERCE)
- ❖ 75% OF ALL CHANGE INITIATIVES IN BUSINESS FAIL WITHIN THE FIRST THREE YEARS (START-UP / BUILD-UP)



CHANGE AS A FACT OF LIFE

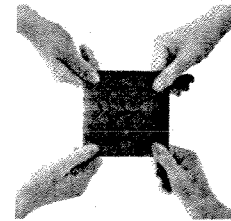
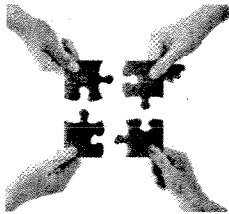
- ❖ ENVIRONMENTAL SCAN
- ❖ FORMAL BUSINESS PRACTICES
- ❖ INFORMAL BUSINESS PRACTICES
- ❖ BENCH-MARKING
- ❖ BEST PRACTICES
- ❖ SWOTS
- ❖ SCENARIOS
- ❖ PROTOTYPES
- ❖ PROOFS OF CONCEPTS OR EXEMPLARS
- ❖ BABY STEPS—SUSTAINABILITY
- ❖ GROW PEOPLE / NURTURE INNOVATION
- ❖ COMPETITIVE INTELLIGENCE (WHO ARE YOUR COMPETITORS? INTERNAL / EXTERNAL)



PREPARING FOR CHANGE

- ❖ POLICIES / PROCESSES
- ❖ PEOPLE

- ❖ PRACTICE
- ❖ PERFORMANCE



- ❖ BE INFORMED
- ❖ BE OPPORTUNISTIC
- ❖ BE STRATEGIC
- ❖ BE VISIBLE
- ❖ BE OPEN
- ❖ BE EDUCATED
- ❖ BE CUTTING EDGE



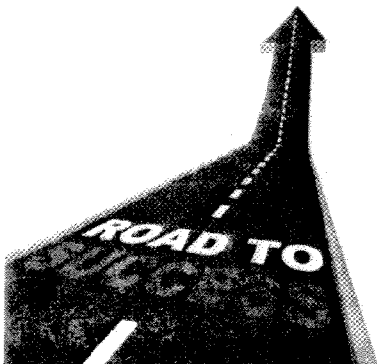
- ❖ BE FLEXIBLE
- ❖ BE CONNECTED
- ❖ BE ENGAGED
- ❖ BE PROACTIVE
- ❖ BE CLEAR
- ❖ BE FOCUSED
- ❖ BE HONEST

CHEMISTRY OF CHANGE

FINDING THE "RIGHT" FORMULA OR PATH?

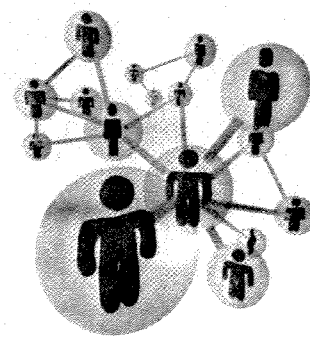
QUESTIONS:

- ❖ HOW DOES CHANGE HAPPEN IN YOUR ORGANIZATION OR CULTURE?
 - ❖ REVOLUTION OR EVOLUTION
 - ❖ TOP DOWN OR BOTTOM UP
- ❖ WHO OR WHAT ARE THE GAME CHANGERS?
- ❖ WHO ARE THE STAKEHOLDERS?
- ❖ WHAT DOES CHANGE LOOK LIKE IN YOUR ORGANIZATION?
 - ❖ CAN YOU "PICTURE" IT?
 - ❖ WHERE ARE THE WALLS OR BOTTLENECKS?
 - ❖ WHAT IS YOUR KNOWLEDGE, "KNOWING" & KNOW-HOW?



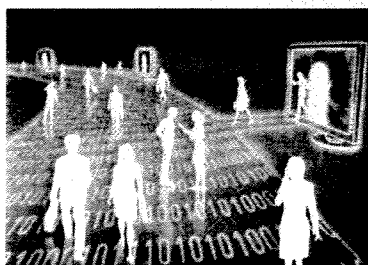
COLLECTING THE DATA

- ❖ RATE OF CHANGE
- ❖ SETTING REQUIRED MILESTONES
- ❖ IMPACT POINT (TIPPING POINT)
- ❖ RETURN ON EFFORT
- ❖ RETURN ON INVESTMENT
- ❖ POINT OF NO RETURN
- ❖ WHAT IS THE COST / BENEFIT OF CHANGE OR NO CHANGE
- ❖ BRAND / PERCEPTION RATIO
- ❖ MISSION / VALUES ALIGNMENT



YOU, THE CHANGE AGENT

- ❖ ROLE MODEL
- ❖ CATALYST
- ❖ LEADER
- ❖ FOLLOWER
- ❖ MENTOR
- ❖ RISK TAKER
- ❖ ENABLER
- ❖ EXPERT (OBJECTIVE)
- ❖ REPORTER / STORYTELLER



RECOMMENDED READING:

- ❖ THE HEART OF CHANGE (KOTTER & COHEN)
- ❖ THE HAPPINESS HYPOTHESIS (HAIDT)
- ❖ NUDGE (THALER & SUNSTEIN)
- ❖ THE TIPPING POINT (GLADWELL)
- ❖ INFLUENCER (PATTERSON ET AL)
- ❖ CRITICAL CONVERSATION (PATTERSON ET AL)
- ❖ DELIVERING HAPPINESS: A PATH TO PROFITS, PASSION, AND PURPOSE (HSIEH)
- ❖ THE PARADOX OF CHOICE (SCHWARTZ)
- ❖ THE CRITICAL PATH TO CORPORATE RENEWAL (BEER, EISENSTAT & SPECTOR)
- ❖ UNLEASHING CHANGE (KELMAN)
- ❖ GETTING YOUR SHIFT TOGETHER (BOUCHARD & PELLET)

