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

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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
- Benchmarking
- 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
- Practice
- People
- 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)