



## HOW TO MANAGE ORGANIZATIONAL CHANGE

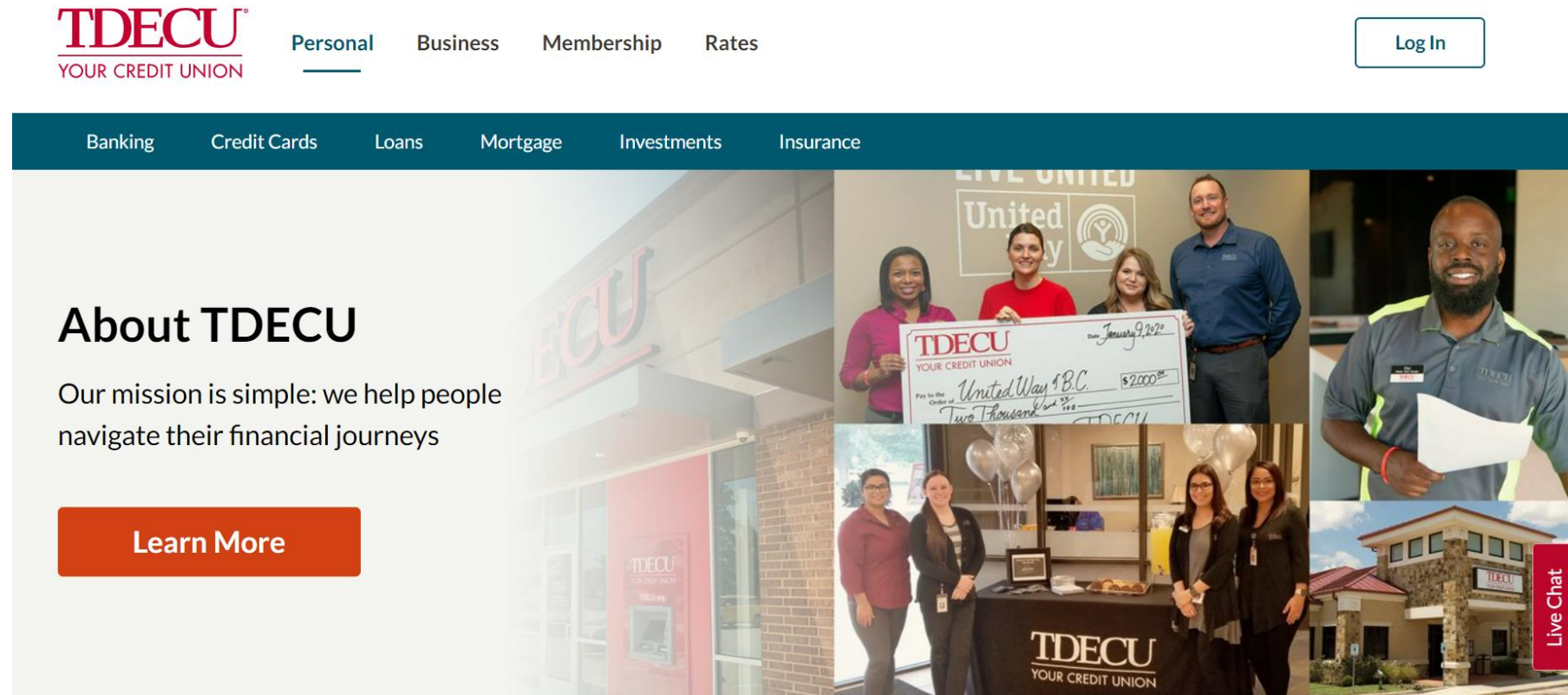


Danny Hurt, VP of Learning & Development  
TDECU



# About TDECU

- Lake Jackson, TX
- \$4.7B in assets
- Over 377,000 members
- 938 FTEs
- 38 branches
- Largest Credit Union in the Houston area



# The Challenge/Opportunity

- Rapidly evolving technology. Cryptocurrency. COVID-19. The explosion of work-from-home staffing. Inflation. Recession. The Great Resignation.
- The past few years have provided **multiple sources of external pressures** to which credit unions and businesses have had to adapt. From transforming cultures to revolutionizing technology strategies or internal processes, **change management has become a major area of focus** for cooperative leaders.
- Methodologies to manage organizational change abound, but one factor to success remains the same: **Leaders must be proactive in addressing the people side of change.**

# A Team Approach to Embracing Change

- TDECU has a team that supports its **core value to Embrace Change**
- Members of the team **collaborate** with project management, marketing, managers and employees experiencing change.
- The team, *placed within learning and development*, heads up our **Change Enablement Strategy**.
- The Change Enablement Strategy team includes **four positions**:
  - a director
  - a manager
  - an analyst
  - and a specialist
- Be ready to be **flexible**; now that the strategy is set, we are moving the Change Strategy and Enablement team closer to the PMO (Project Management Office)

# The World's Most Popular Change Management Certification

Addressing unexpected change while keeping change management momentum going are top priorities for today's organizations. Prosci's Change Management Certification Program gives participants the knowledge, skills and tools to drive successful change initiatives—no matter how complex or urgent.

Following this three-day, interactive learning experience, you'll earn the distinction of being a *Prosci Certified Change Practitioner*.

**This program is the perfect solution if you're...**

✓ Tackling new must-win projects



# Driving Enterprise Transformation Forward

- Change happens one person at a time.
- We help individuals get through the change curve through *communications, training, project work, and individual consulting, as needed*.
- Our team focuses on **individual adoption** to move people through the change and make the process easier.
- For small changes, *simple communications might suffice* for awareness.
- **Major events**, such as opening a new location or changing the organizational structure, **require an elongated approach** to increase buy-in.
- The top 2022 achievement was the implementation of the Change Management Ambassador program (embedded change agents in each major department)



# A Methodical Approach

- **Cascading awareness** begins at the *executive level*
- Then progresses to the *vice president and director level*
- Before moving to the *manager level*
- And, finally, to the *individual level*
- **If a manager hasn't bought in, then neither will their subordinates.**



## Example of Successful Change: Conversion from ADP to Workday

- Instead of trying to train people on every individual task or provide a manual, we put **15- to 20-second demo videos of the most common tasks on our intranet.**
- Focusing on **awareness up front** and **simplifying training** paid off with a major conversion that caused very little business disruption.
- Adoption rates were so high, we didn't have to run parallel systems for much more than a quarter. In fact, we secured **universal adoption** across all the new system's modules within five months.
- To drive results, credit unions need to convert the reasons for change into **a clear 'what's in it for me' message** tailored for different audiences.
- Focus on the **positive impacts** or how a particular change will help a specific audience or improve processes and **stress that message over and over again.**



# Key Takeaways & Advice for Others

- There are a number of change management methodologies. **Study your options, pick one, and commit to it by having someone on staff specialize in it.**
- Have an **executive sponsor** on the leadership team – this is key to drive adoption.
- **Regular communications** can't be stressed enough.
  - **Update leaders** and inform them of barriers, doing so allows the organization to do the right things at the right time.
  - Work closely with an **internal communications/marketing team** to tighten messaging and ensure it fits with the overall brand is also important.
- Remember to **go through your model consecutively** without jumping around.
- Lastly, look for ways to **align your methodology to support an existing organizational value**. *For example, at TDECU having “Embrace Change” as one of our core values.*

# Q&A Discussion Period

# THANK YOU FOR WATCHING



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