"Everyone thinks of changing the world, but no one thinks of changing himself."

- Leo Tolstoy
Speaker Bio – Heather Moehlenbrock

- Real Time Leader at Edward Jones
- Responsible for all Scheduling, Monitoring and mitigation activities
- Experienced Real Time Analyst and Service Specialist
Speaker Bio – Mark Rhodes

- Current Workforce Management Leader at Edward Jones
- Over 20 years of contact center and leadership experience in three "Fortune 500" companies
- 4-time SWPP presenter
- Prosci® Certified in Change Management
Agenda

• Goals and Background

• The First Rollout

• Change Management Principles

• The Second Rollout

• Questions
Has This Happened to You?

• Have you ever had a great new system, tool or process you wanted to implement?
  – Develop the project plan
  – Include key stakeholders
  – Map out an implementation timeline
  – Train all the end users on the new way

• 6 months later...
Goals

• Understand the difference between Project Management and Change Management

• Witness the steps (and missteps) from the Workforce Management rollout at Edward Jones

• Take away some tips on how to help your people and organization adopt change
Mission:
We help serious, long-term individual investors achieve their financial goals by understanding their needs and implementing tailored solutions

- WFM supports ~900 contact center agents in 28 defined departments (forecast groups)

- Workforce Management established in 2014
Business Case

• The Firm decided we needed WFM
• I.T. selected the vendor
• After vendor selection, started hiring WFM team
• Technical training for Supervisors and Agents provided by the vendor
• Forecasts and schedules were created

• Monitoring began!
Early Results

- What went well
- What didn't go well
- Result: Project = Success; Adoption = Fail
Feedback

• "Everything was fine – why do we need this?"
• "I like the way things are now."
• "I don't see the benefits of changing."
• "How do I fit this into all the other things I'm working on now?"
• "It's too complicated to use."

The People did not "Change"
The Goal of Change

• Improving an Organization by altering how work is done
  
  *(From Prosci®)*

Project Management

• Project management is the application of knowledge, skills, tools and techniques to project activities to meet project requirements.
  
  *(From PMBOK® Guide, Third Edition)*

Change Management

• Change management is the process, tools and techniques to manage the people side of change to achieve the required business outcome.
  
  *(From Prosci®)*
5 Principles of Change

• 5 things need to be in place in order for Change to be effective:
  – Awareness
  – Desire
  – Knowledge
  – Ability
  – Reinforcement

Organizations Don't Change: Individuals Do
5 Principles of Change

• Awareness
  – Why a change is needed
• Desire
  – Why you should want to change
• Knowledge
  – Steps to take to change
• Ability
  – Have the skills to do the new process
• Reinforcement
  – Critical for sustaining change
Understanding Your Audience

• Different groups, and different people will be in a different place with any change
• Need to assess the change readiness of:
  – Senior Leaders
  – Supervisors
  – Agents
  – WFM Team

• Each group may be in a different place
The Most Important Question

- Everyone's favorite radio station: WII-FM!
- Effective Communications
• Recognition that change management didn't happen effectively - ownership

• Division Leader reconfirmed the vision along with expected benefits

• Focused on communicating to Supervisors
Actions Taken

• Collected feedback from Supervisors and associates

• Developed plan to focus on Clarity, Commitment and Capability
12 Point Plan

• Clarity
  – Roles and Responsibilities
  – Accountability measures

• Commitment
  – Established communication streams
• Capability
  – Tactical process refinement
    • Call-In Line process
    • Time Off Requests
  – New functionality
    • Strategic Forecasting
    • Forecasting and Scheduling non-phone work
    • Reporting and scorecard development
Where We Are Now

• Significant improvement in acceptance

• Process standardization and refinement

• Moving to a state of continuous improvement and reinforcement
Summary

• Change Management is different from Project Management – and is as important

• Different messages are better received when delivered by different communicators

• Need to identify individual needs in order to affect change ("WIIFM")

• See www.prosci.com for more info on Change Management
Thank You!

Questions?
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