



# 5 Principles for Change Management in Field Service

"To improve is to change; to be perfect is to change often."

Winston Churchill

**As the old saying goes, “the only thing constant is change.” This is especially true in field service where people, parts, technology, schedules, and processes are always in flux. But how do you get the whole organization to successfully make a change?**

Whether you’re moving from pen, paper and clipboards to a comprehensive service management system, or just changing processes to better serve your customers, here are five principles for change management that will help speed adoption and the efficient rollout of new technology and processes in your field service organization.





# 1. Assess the Change

If you can't measure it well, you're evaluating the right thing.

Change management is a project and like any good project manager, after you understand the purpose of the project, you have to define the scope of the change. How it's defined won't always use typical metrics. Measures like number of users or rows of code don't tell you anything about peoples' expectations, skill levels or general behavior. These things are hard to measure but essential to understand because they tell you how big the adoption challenge will be.

Pulse your service team to uncover their views on change and identify employees who are most uncertain, worried or risk adverse. You'll want to note the activities that require big modifications in skills or attitudes. For example, if your field technicians don't use mobile devices for work, evaluate the time needed to not only learn about the device, but also understand its benefits -- appreciate a site survey they can finish or a service report that they can produce with a couple of screen swipes and button pushes. Document attitudes and rank each change activity. This part of your project plan will help you scope the resources needed and allow you to set a benchmark for time to adoption.



### THE CHANGE "TOOLBOX"

#### MEASURE THE LIKELIHOOD OF SUCCESS

If you don't know how hard your change management project will be, use a tool like the Boston Consulting Group's Dice Model (<http://dice.bcg.com/>). Once you know your score, you can make sure you are starting your project off right.





# 2. Engage the Head and the Heart

Actions speak louder than words.

People are logical to a point, but when it comes to change, we all tend to use our heart more than our head. Even if a new service system is supposed to save your employees tons of time, simplify their lives or create a better work environment, they may agree to use the new system initially, but ultimately find a work around that suits them. And, fancy presentations from top executives on the importance of the change and the benefits of the new system often won't work to motivate your employees to adopt it.

Engagement on a personal level, such as in small group meetings or in one-on-one discussions, is the best way to have meaningful conversations about the change. It is also a great source of candid feedback for ongoing assessment and updates to the change project plan. Employees want a way to relate to the change. If they see their peers in other divisions or companies having success with similar systems it will help make the benefits of the new solution more real. Use your experiences and others' experiences to inspire a change.



### ELEVATOR PITCH EXERCISE

Make the change real by asking employees to come up with their best elevator pitch for the new project. If they put the value of the new system into their own words, they'll not only be able to tell others, but they'll be more likely to believe it.





### 3. Create the “Change Agent Network”

It's not just *what* you say, it's *who* says it.

It is essential for your change management project to have champions. While your champions should come from all levels in all parts of the organization, make sure to include direct supervisors. The managers of employees most affected by the change are the most influential and will best understand what it's going to take to get buy-in on the new solution. Also include the first adopters who have helped evaluate, write requirements or test a new system. They are experts who have “been there, done that” and they lend credibility to your project.

The most important role of the network is to translate the higher-level strategic discussion into the day-to-day vocabulary of your service team. You can tell a service team that their adoption of the new system will drive greater productivity, but until that is translated into “you won't have to do hours of administration anymore” they won't understand the win-win of a new way of doing things. The second most important role is to be an immediate resource for employees' questions, concerns or feedback on the new system. Without a network of people on the front-line, you are forced to manage blindly – with no direct link to the important people at the center of your change management project.



THE CHANGE  
“TOOLBOX”

#### CREATE A TEAM ROSTER

Create a grid for your change agent talent and identify the key areas where they have influence and can contribute the most to your change management project. Assign these people based on functional area or specific expertise.





# 4. Lead Through Resistance

To be believed you need to be trusted.

The good news for your change management initiative is that the majority of employees will embrace change simply because they want to do their jobs well. The rest will be reluctant because they are either confused or don't have all the facts. To reduce confusion, consistently communicate the benefits of the new system through your network. A good training plan with excellent delivery will also help. However, if the resistance comes from a dislike for the change or the person who communicates it, then you have a relationship to either build or mend.

Trust isn't something you earn overnight -- it takes a lot of work to convince employees that a change is good for both them and the service business. As a change practitioner, you and your network need to be honest with people who will be negatively impacted by the change. Sugarcoating issues, such as modifications in job definitions or customer assignments, will make the situation worse for not only the employee, but also for future projects. A lot of resistance can be avoided if employees trust the people involved with the change project.



DELIVER THE MESSAGE  
OFTEN AND EVERYWHERE

How do you communicate change? The simple answer is any and every way possible. Think about all the ways you can deliver your change message through "what's in it for me" stories, frequently asked questions or presentations and relay those messages often through training, internal social networks or employee portals.





# 5. Lead Through the Adoption Cycle

The system is live, but the change project doesn't end there.

Adoption generally follows a cycle and while one hundred percent adoption is the goal, it's rarely realized right away. You will always have people in your organization that take to new things more easily and it's important to put them to work. Get them out on the front lines as system champions or training coordinators once the system is implemented.

Know when to say "when" with naysayers. They may never adapt, so the best policy is to not draw too much attention to their attempts to undermine the change process. Instead, turn your attention to building a more consistent culture for change. Building a culture that accepts change means that your adopters are positive, focused, flexible, organized and proactive. Take the time to emphasize those characteristics and work toward them in future change management projects. New employees to the company will notice and follow the cultural trend.



### THE THREE R'S (RANK, RE-EVALUATE OR REASSIGN)

Once the new system is live, assign a simple rating like A, B or C to each person or team to indicate the level of adoption. Get your A team to work with the B and C groups. Have them evaluate their progress and make suggestions. If the C's don't come around, try something else to get them on board or reassign them.

## WHO IS SERVICEMAX?

Imagine flawless field service. Homes, offices, hospitals — there are machines and systems everywhere that need to be maintained and serviced. How does that service technician know where to go, what to do and how to satisfy his or her customer quickly and efficiently? ServiceMax delivers the first and only complete, mobile field service software suite available in the cloud. By optimizing scheduling, managing work orders, tracking parts and more, ServiceMax helps organizations perfect service delivery to their customers, delight their customers and grow their service revenues.

