



LOCAL

—

2021 Change & Transformation Survey

A collaborative research project
with Marla Gottschalk, Ph.D.

November 2021

LOCAL

About Dr. Marla Gottschalk

Marla's work focuses on building core stability for individuals, teams and organizations.

She has worked with numerous organizations, helping clients face obstacles and get “unstuck”. Over 2+ Million people follow Dr. Marla on LinkedIn. Her perspectives on work life have also been shared at The Wall Street Journal, Harvard Business Review, Talent Zoo, US News & World Report, and The World Economic Forum blog.

She holds a B.S. in Psychology from Michigan State University and a Ph.D. in Industrial & Organizational Psychology with a minor concentration in multivariate statistics from Wayne State University in Detroit, Michigan.



Marla Gottschalk, Ph.D.
marlagottschalk.com/

About LOCAL

We are an
**Employee Experience
Consultancy**

in the form of a
consumer-grade agency.

We work as an
**Agile Marketing
Department**

for People, Technology,
and Growth Leaders.

Our focus is on
**Internal Culture
and Change**

fostering deep employee
belief, adoption, and opportunity for
involvement.



Our unique Change Marketing™ process combines the strategic models from progressive Change Management with audience-first strategy and creativity of contemporary Consumer Marketing.

About our survey



It has been reported that **two-thirds of change initiatives fail***.

In an effort to deepen our understanding of change behavior within organizations, LOCAL collaborated with Dr. Marla Gottschalk to conduct a survey in Q1 2021 among her talented and extensive network of change professionals.

More than 150 change professionals responded, providing insights on attitudes, challenges, needs and opportunities to help shape future work in driving effective change.

Several themes emerged from the survey responses. Included are **top 10 key takeaways to explore** (as individuals and company-wide) in creating successful change initiatives.



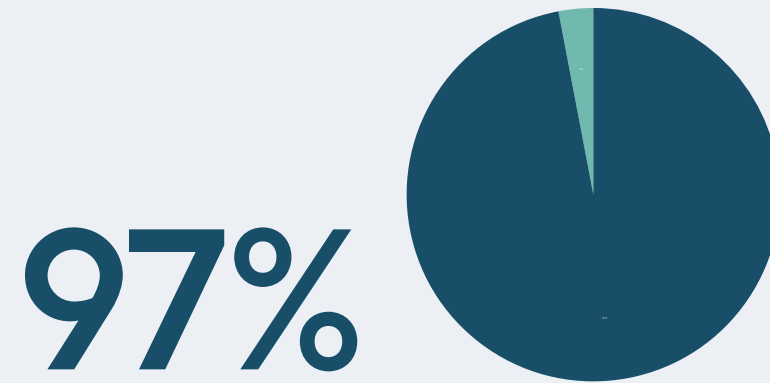
Top 10 Key Takeaways

From the 2021 Change &
Transformation Survey

No. 1

Key takeaway

Lack of effective communication concerning “how, why and what” is a leading contributor of failed change initiatives.



of survey respondents agree that lack of communication is a contributor to failed change initiatives



“The single-greatest challenge I face in the creation of successful change initiatives is communicating what, when and the outcome.”

“Lack of communication details - assuming everyone understands the information in the same way.”

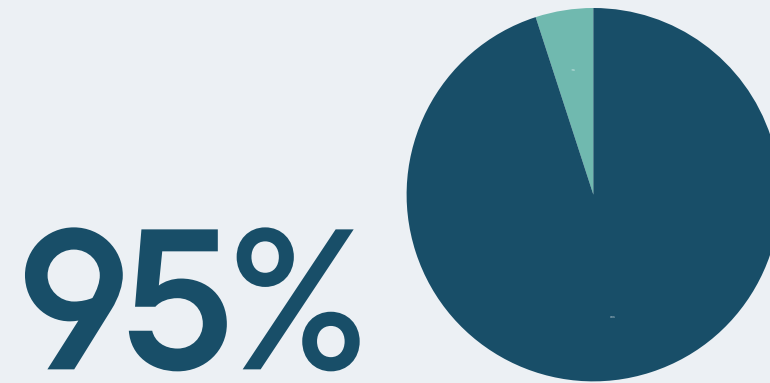
“Balancing the need for simplicity with a demand for detail.”

“Articulating with clarity the direction the business wants to go.”

No. 2

Key takeaway

Leadership and real sponsorship throughout all aspects of change initiatives is a key challenge that change professionals face.



agree that a lack of clear sponsorship from leaders is a contributor to failed change initiatives.



“Involved leadership is the critical ingredient. Everything else is secondary.”

“Unwillingness of sponsors to invest head, heart and gut, and to give the change the time and energy it requires of them.”

“One of my biggest stumbling blocks is identifying which middle manager will decide to block, either actively or passively.”

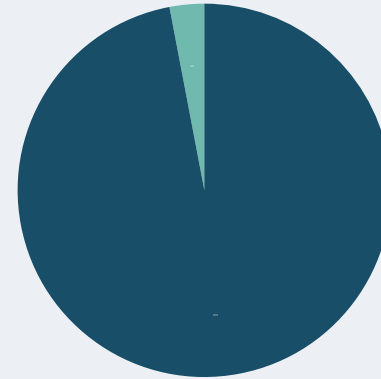
“We need to build momentum for change advocates while leaving space for the legacy group.”

No. 3

Key takeaway

Organizational readiness and resources are top concerns.

97%



agree organizations **fail to consider** “organizational readiness”

Additional Beliefs About Failed Readiness & Resources

94%

Agree there is a lack of awareness concerning coordination challenges among functions/departments

93%

Agree there is a lack of shared belief across the organization about the need for change

90%

Agree that identification of specific behaviors that would reflect the desired change



“Not having the proper infrastructure and teaming support to carry out an initiative with consistency.”

“The idea is never the problem. It’s the lack of consistent implementation, messaging and the loss of vision and purpose.”

“Most people hate the way things are, and they hate change at the same time.”

No. 4

Key takeaway

Using human insights is critical for effective change.



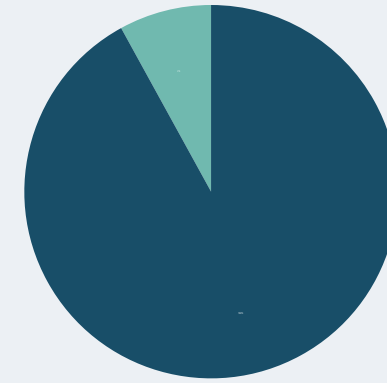
“Change is hard because it also means breaking some habits. It’s harder now since many of us are working from home. **To produce change without human contact is a big challenge, so investing in human communication can be the key to improve effective changes within a company.** If combined with a profound knowledge of the human procedures and installed habits, I believe we all would be happily surprised with the outcomes we would find at the end of all the change process. We need to humanize more and more all change processes. After all, the **resistance comes from human beings.**”

No. 5

Key takeaway

Gaps exist between individual expertise and organization-wide success.

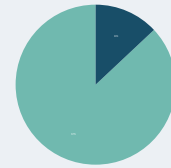
92%



believe they have the **individual skills** to guide effective change

but

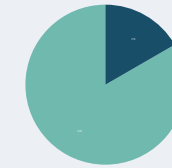
only



13%

indicate that the change management strategies they've experienced were completely successful

only



1 in 5

strongly believe that their organization has the skills to implement successful change initiatives

Training in all areas from individual change certifications to organizational or departmental readiness could bridge the gap.

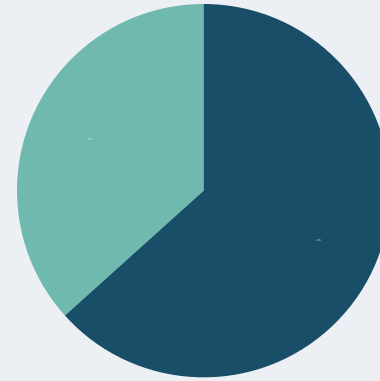
No. 6

Key takeaway

Companies may not see value in training, but change professionals do.

Despite

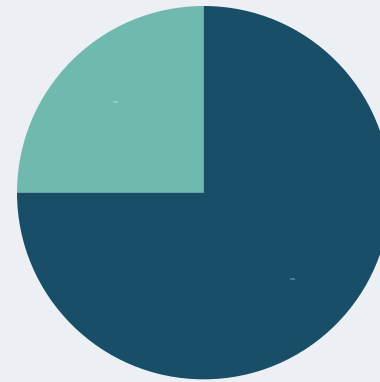
57%



of respondents said **their company would NOT** invest in training related to marketing and/or advertising principles.

The vast majority

75%



of respondents **are LIKELY to seek individual training skills** that support their role with change initiatives in the next 12 months.



“I do not feel the C-Suite would see the value in it.”

“They are unlikely to invest in it due to [perceived] cost.”

“It depends on price [of training] and ROI.”

“We have to create a strong business case for training.”

No. 7

Key takeaway

Change professionals are looking for useful training tools and techniques.

Most useful training topics fell into three main areas:

- 1 **Insights development**
- 2 **Building narrative**
- 3 **Sustained content**

What we heard from you on training needs:

- 1 How to communicate a change initiative's vision, mission and values.
- 2 How to create a guiding coalition among functions and/or departments.
- 3 Techniques to communicate a change initiative's potential value to different audiences.
- 4 How to develop a business case into a clear "reason to believe" for employees.
- 5 How to create an engaging story about the change.
- 6 How to sequence the release of communications to support change initiatives.
- 7 Techniques to develop meaningful insights about change initiative benefits for different audiences.
- 8 How to create compelling content to share within the organization.
- 9 Techniques to assess attitudes toward change among different audiences.
- 10 Methods to identify and/or develop change advocates and/or early adopters.

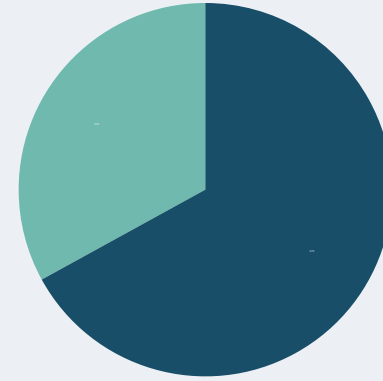


No. 8

Key takeaway

Change professionals see a benefit to learning “marketing and/or advertising best practices” to help create successful change initiatives.

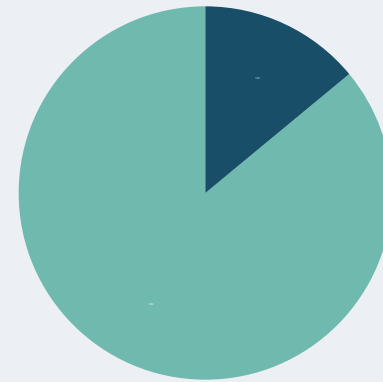
67%



felt it would be beneficial to learn how to use marketing and/or advertising best practices in the creation of successful internal initiatives

And only

14%



were unsure of how marketing and/or advertising best practices would be beneficial



“**Yes**, I always feel marketing tactics are imperative to all facets of creation of initiatives to thoroughly make the case and get the points across.”

“**Yes**, to increase understanding of ‘why’ the change is so beneficial.”

“**Yes**, this adds another layer to how we address our clients and show our value.”



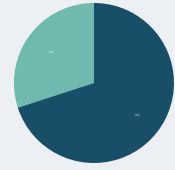
“**No**, management by announcement is not an effective change strategy.”

“**Nope**. People's BS/spin detectors are set to cynical - have been for years, but not to this sensitivity.”

No. 9

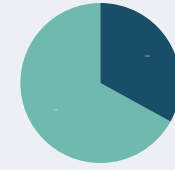
Key takeaway

Change management professionals prefer live, guided workshops.



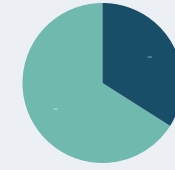
70%

Live, guided workshop



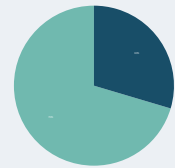
33%

One-on-one sessions with subject-matter experts.



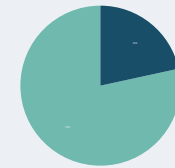
34%

Live conferences, roundtables, or panels.



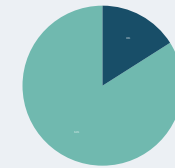
29%

Self-paced virtual training.



19%

Books, journals, and articles.



16%

Searchable à la carte resources (YouTube, LinkedIn Learning, etc.).

Other suggestions included: audiobooks; customized tool kits; Mastermind groups; peer study groups and workshops; and tangible practice and pilot testing.

No. 10

Key takeaway

Long-term value and ROI needs to be demonstrated for organizations to invest in training.

Case studies & hard data

will help in achieving buy-in for training initiatives.



“We really need to show a return on investment. Budgets are very tight and we have our share of skeptics.”

“I do, but there would need to be a **long-term story of the benefits**, e.g., X% more engaged workforce, etc.”

“We need to show the **cost of staying the same.**”

“Often, people within organizations have seen change initiatives come and go, failing each time. In my opinion, **success will depend on sustainability** and proving out that what you're suggesting has **staying power.**”

Understanding Change Behavior

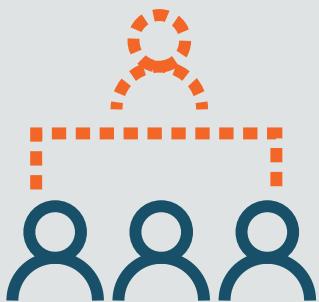
Top 10 Key Takeaways

Key Takeaway
No. 1



Lack of effective communication concerning “why/how/what” is a leading contributor to failed change initiatives

Key Takeaway
No. 2



Lack of clear sponsorship from leadership is a key challenge that change professionals face when it comes to change

Key Takeaway
No. 3



Organizations often fail to consider “organizational readiness”

Key Takeaway
No. 4



Using human insights is critical for effective change

Key Takeaway
No. 5



Gaps exist between individual expertise and organization-wide success

Key Takeaway
No. 6



Companies may not see value in training, but change professionals do

Key Takeaway
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Change professionals are looking for useful training tools and techniques

Key Takeaway
No. 8



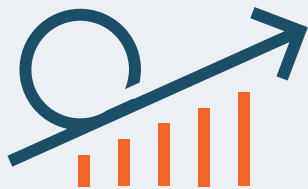
Change professionals see Learning “marketing and/or advertising best practices” as helpful to successful internal initiatives

Key Takeaway
No. 9



Change professionals prefer live, guided workshops

Key Takeaway
No. 10



Long-term value and ROI needs to be demonstrated for organizations to invest in training



Thanks again



Reach out to us.

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or visit us at

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