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ABSTRACT

Change has become a "way of life" in organizations. The pace of change has increased substantially in recent years as a result of issues such as the pressures of global competition, the impact of the Internet, customer demands and ever-changing enhancement of technical capabilities. These changes affect what people do and how they fulfill their responsibilities, and therefore, there are varied reactions. Historically, failures in change implementation have not been attributable to a lack of technical feasibility and functionality but instead have been the result of employee resistance.
The difficulty of implementing organizational change has presented an ongoing challenge to managers. As we anticipate the future, paramount technological changes and shifts in strategies as a result of innovations such as cloud computing, social networks, and smart phones are on the horizon, all of which provide numerous opportunities for marketers. Customer relationship management (CRM) implementation in particular, warrants consideration of a change management strategy. This paper reviews several successful change management and implementation strategies that have been utilized to address technological change and proposes an enhanced model to guide managers as they deal with technology-based organizational changes.

INTRODUCTION

Change management is the process by which an organization gets to its future state or vision. Change begins with the creation of a vision for change and then empowering individuals to act as change agents to achieve that vision (Scribd.com, 2011).

Managing organizational change is a decades, perhaps centuries, old problem that continues to create consternation for managers. It is almost universally understood that in order to maintain competitive position, willingness to change needs to be part of today's organizational culture. This is especially true for the executive associated with organizational information and communication systems.

Because managers are not always trained to manage change, the management of change frequently instills fear in them. It has become increasingly important for executives associated with technology to be both familiar and adept at change management processes, because the introduction of new or altered systems always involves change. An IBM-sponsored white paper entitled "Ten Ways to Establish a Strategic Advantage" (2009) boldly states that "how companies address change can differentiate the winners from the losers." People settle into a comfort zone with the way things have always been done, but in today's organizations, technology-driven initiatives, in particular, are very fast-moving, and change has become a way of life. To reinforce the fact that managing change is an age old problem and that it is imperative that managers strive to encourage and build willingness to change into our organizational cultures, consider an 1872 quote from Charles Darwin (Borland, 2007): "It is not the strongest of the species that survives, not the most intelligent, but the one most responsive to change."

As organizational change is planned, the structure and established relationships within the organization should be taken into consideration as they may be influential and impact the process. Higher levels of management support can be a positive influencing factor in organizational business process improvements. In terms of technology-related changes, it has been demonstrated that a closer CEO-CIO reporting relationship is associated with higher levels of senior management support (Law & Ngai, 2007). This can impact marketing, for instance, with the implementation of technology through customer relationship management (CRM) systems. CRM involves the use of information technology for customer solutions with a connection to relationship marketing. Kim and Pan (2006) note that strategy, process, and technology are combined in a CRM system to manage customer relationships, Ryals & Payne (2001) describe CRM as "information-enabled relationship marketing," and Bull (2003) surmises that fundamentally, CRM systems are information systems that allow organizations to be customer focused.

As Payne and Frow (2005) note, change management is essential in CRM implementation. Further, Galbreath and Rogers (1999) suggest that the introduction of information technology and business process change requires effective leadership. This paper reviews several successful change management and implementation strategies that have been utilized to address technological change and proposes an enhanced model to guide managers as they deal with technology-based organizational changes such as CRM.

CHANGE IN ORGANIZATIONS

The business environment is extremely fast-paced and competitive on a global scale. In order to remain competitive, organizations find it necessary to implement programs and initiatives designed to radically re-engineer organizational processes and structures. In scope, these programs go far beyond the everyday changes that are routine in most organizations.

Particularly in organizations that are facing a competitive crisis as a result of obsolete technology infrastructures, there is a high likelihood that they will be forced to implement transformational programs. Technology is often a central focus in this transformation and will be viewed as a mechanism for improving organizational efficiency by automating, redesigning, or eliminating organizational processes (Cunningham & Finnegan, 2004). Changes in many areas of the organization, including marketing, are often predicated on technology.

According to Gray (2006), organizational change comes about in many different ways. Change can come in response to a crisis or be incremental. It can be radical and revolutionary or evolutionary.

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It can be opportunity based or emergent. Gray opines that "rather than imposing the change from the top down, the demand should come from the frontline people who are most affected."

Since every change in an organization's information systems changes what people do and how they work, these changes can be described as both technical and highly political. Change typically has considerably more to do with the flow of information, new business practices, and customer expectations than with technical details (Gray, 2006). The implementation of new systems always involves change; therefore a comprehensive understanding of change management is extremely important to not only technology managers, but all managers whose divisions will be impacted by technological changes.

Companies that successfully embrace change management gain at least three significant benefits (Borland, 2007):

- They spend less than 5 percent of technology time on unplanned work.
- They experience a low number of "emergency" changes.
- They successfully implement desired changes more than 99 percent of the time, and experience no outages or episodes of unplanned work following a newly implemented change.

Whether proposed organizational changes involve several processes or a system-wide re-engineering, it is likely that affected individuals will feel uneasy and perhaps intimidated by the change. Even the simplest organizational change will bring about a reaction, most frequently one of resistance within the organization. Shuler Consulting (2003) has compiled a list of reasons why employees resist change:

- The risk of change is seen as greater than the risk of standing still.
- People fear the change of routine and are not willing to learn.
- People have no role models for the new activity.
- People fear they lack the competence to change.
- People feel overloaded and overwhelmed.
- People have a healthy skepticism and want to be sure that ideas are sound.
- People fear a hidden agenda among would-be reformers.
- People feel that the proposed change threatens their notion of themselves.
- People anticipate a loss of status and/or quality of life.
- People genuinely believe that the proposed change is a bad idea.

With a fair degree of certainty that some of the issues in the previous list will emerge with the introduction of organizational change, it may be prudent to ask the following questions before embarking on a significant strategic change initiative (Matejka & Murphy, 2005):

- Is this change really necessary?
- What is driving this perceived need for change?
- Would successful implementation really achieve the desired results?
- Is a better choice available?
- Realistically, can your organization successfully implement this change?
- Is this change worth the costs?

This cautionary set of questions for long-term changes is not intended to discourage change or downplay the importance of small, quick changes that can be effective and more easily achieved but can also help facilitate the realization of the organization's vision and objectives (Luftman, Bullen, Liao, Nash, & Neumann, 2004).

Although there are ample plans, research studies, and consulting firm recommendations on how to effectively manage organizational change, there are a number of well-known mistakes that are continually repeated. Manzoni, in a Financial Times article (2001), suggested that there are seven common mistakes that constantly emerge in the management of change:

1. There are many factors involved in why employees resist change (structural, lack of understanding, inadequate skill sets), and there is a tendency to focus on simply believing that employees don't want to cooperate, and that is an oversimplification.
2. Change takes time, and managers must be persistent in reinforcing desired behavior for many years.
3. Managers fail to develop an understanding among employees of how the organization will get from Point A to Point B.
4. The change plan fails to allocate sufficient time for managers involved to carry out assigned tasks and ensure the success of the change project.
5. Managers, through subtle behaviors, can contribute to the known human nature trait of employee resistance to change. Employees must be given a voice in the plan.
6. When deadlines approach too rapidly, there is a temptation to resort to coercive management practices rather than inclusive ones.
7. There is frequently a failure to convey a personal return on investment for time and energy to the employees.

Software that is relatively easy to configure and capable of integrating with other systems is available to assist in the change management process (Conrad, n.d.) The implementation of a structured and automated change management process can reduce both the cost and risk involved with organizational change (Hewlett-Packard, 2010).

MANAGING CHANGE

Change management has been a major research topic for many years, and therefore, there are countless plans available in a multitude of research sources. Timmerman (2003) defines change as the conversion of a technology, product, or idea from conceptual knowledge into some form of organizational practice, acknowledging administrative, technological, product-based, and human resources as four general types of organizational change. Media use by implementers may recursively lead to reinforcement or modification of an implementation approach and may signal the development of a change across implementation phases (Timmerman, 2003).

It is generally agreed in the professional community that organizational change will vary with situations; therefore, no single change model can be applied to deliver a perfect change process. This paper draws upon Kotter's Linear Model (1996/2010), the Unfreezing-Change-Refreeze Model based on work by Lewin and Schein (Wirth, 2004; Bartoli & Hermel, 2004; Luftman et al., 2004) and the EFQM Excellence Model (Pfeifer, Schmitt, & Voight, 2005) due to the adaptability of these models to managing organizational change propelled by technology. The models are prominent in the literature, contain similarities, are relatively straightforward, can be applied to technological change, and unquestionably, the point of emphasis that surfaces as these models are examined is the absolute necessity of having a formalized plan if you want the change process to be effective and successful. The underlying message of the selected models is straightforward and readily conveyed to those involved with change in an organization.

The first model considered and one of the foremost processes for managing organizational change is that proposed by the renowned leadership and change expert, John P. Kotter of Harvard University. Kotter (1996) advocates an eight step linear process for successful management of change. The steps, with significantly condensed explanation points, are as follows (Kotter, 2010):

Step One: Create a sense of urgency
- Examine market and competitive relations
- Identify and discuss crises, potential crises or major opportunities.

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- Provide convincing reasons to get people involved. Kotter indicates that 75% of managers need to buy into change for success. You must work really hard on Step One.

Step Two: Create a Guiding Coalition
- Assemble a group with enough power to lead the change effort
- Encourage the group to work as a team

Step Three: Create a Change Vision
- Create a vision to help direct the change effort
- Develop strategies for achieving that vision

Step Four: Communicate the Vision Buy-in
- Use every vehicle possible to communicate the new vision and strategies
- Teach new behaviors by the example of the Guiding Coalition (from Step Two)

Step Five: Empower Broad-based Action
- Remove obstacles to change
- Change systems or structures that seriously undermine the vision
- Encourage the risk-taking and nontraditional ideas, activities, and actions

Step Six: Generate Short-term Wins
- Plan for visible performance improvements
- Create those improvements
- Recognize and reward employees involved in the improvements

Step Seven: Build on the Change
- Use increased credibility to change systems, structures and policies that don't fit the vision
- Hire, promote, and develop employees who can implement the vision
- Reinvigorate the process with new projects, themes, and change agents

Step Eight: Anchor the Changes in the Culture
- Articulate the connections between the new behaviors and organizational success
- Develop the means to ensure leadership development and succession

Kotter (2010) reports that his research experience over a 30 year period has proven that 70% of all major change efforts in organizations fail. This is largely due to the fact that organizations fail to take a holistic approach to manage the change. Kotter strongly encourages organizations to adopt his 8 step process to increase their chances of success and concludes: "Without the ability to adapt continuously, organizations cannot thrive."

Another frequently cited change model to consider is known as the Lewin-Schein Three-Stage Model which was originally theorized by Kurt Lewin and later detailed by Edgar Schein. The Lewin-Schein Model is commonly referred to as the *Unfreezing-Change-Refreeze Model* (Wirth, 2004; Bartoli & Hermel, 2004; Luftman et al., 2004).

The first stage of the model, *unfreezing*, is a difficult task that involves helping those affected and involved to understand that a change is required, and they must let go of how they have always done things. Weick and Quinn (1999) state "Classic machine bureaucracies, with reporting structures too rigid to adapt to faster-paced change, have to be unfrozen to be improved." "…The challenge is to gain acceptance of continuous change throughout the organization." The second stage, *change*, means old actions are replaced with new actions that are consistent with the goals. Working in groups or obtaining support through education and training are important. The third and final stage, *refreezing*, means the new process has become the norm and changes are comfortably used all

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the time as they have been incorporated into everyday business processes (Luftman et al., 2004; Scribd.com, 2011).

For clarification, some of the items in each of the three stages warrant brief explanations (Luftman et al., 2004). For instance, in the *unfreezing* stage, pain is one of the stringent motivations for change. Pain occurs when it is clear that an organization is failing or about to fail. A second strong motivator occurs when one sees that his/her job will benefit from new process and technologies. A third major impetus is a charismatic and respected leader. Impediments to change in the unfreezing stage include the complexities of the many changes to the organizational culture, processes, and personnel brought about by the introduction of new technologies. Obviously, as new technologies introduce new learning curves, a negative reaction to the change is common, and anxiety about the change must be converted into motivation for change.

A successful *change* stage mandates well-defined objectives, a well-articulated communication process, and a plan that emphasizes strong leadership, the involvement of the “right people”, effective team-building practices, and a reasonable allocation of resources (time, people and money) to support the change.

The needs and demands of stakeholders, defined as “all those involved or affected by the change,” must also be carefully considered and addressed. Closely related is the human reality that there will be resistance to change and therefore plans to deal with the resistance should be established in preparation.

Finally, in the *refreeze* stage, the newly introduced changes need be institutionalized to the extent that they become part of the cultural norm of the organization. Since resistance to change is natural and inevitable, it is likely that some may outwardly appear supportive of new initiatives while creatively working to sabotage efforts. The agent of change must make every effort to find the resistances and try to understand and deal with management issues of contention. Continued failure to succeed may impose the necessity for implementation of negative mechanisms such as indoctrination and coercion.

The Lewin-Schein linear model is very relevant when it is necessary to create change. The model suggests that it takes a significant force to propel change, given Lewin’s view that situations and systems be viewed holistically, so a drastic occurrence would be needed to force a move from status quo that would serve to unfreeze the system. Implementation of a CRM system is an example of such a drastic occurrence. When change is continuous, the problem is not one of unfreezing, it is instead one of redirecting what’s already under way (Weick & Quinn, 1999).

A third model that warrants consideration is referred to as the EFQM Excellence Model (Pfeifer, Schmitt, & Voight, 2005). This model is based on the principles of quality (the totality of features of a unit as regards its suitability to fulfill specified and expected requirements) in strategic change processes and contains steps similar to those of the Kotter and Lewin-Schein models. The authors state however, that the EFQM model is a control-loop model rather than a sequential model. They indicate that during the reinforcement stage, the organization environment must be examined for factors that might necessitate further development of the vision which would necessitate closing the control loop and repeating the process with the adaptation of the vision.

Pfeifer, Schmitt, & Voight (2005) provide extensive details for the following condensed explanations of the five stages of the EFQM Excellence Model. Stage One of the EFQM Excellence Model is referred to as making a decision, and this stage seeks input from clients, competitors, society, laws and the environment. The primary result of Stage One efforts is a vision of how the company will look in about ten years.

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Stage Two deals with preparing change and creating a feeling of urgency. Strategies in this stage include showing the attractiveness of the change, confronting employees with clear expectations, showing that it can be done, and creating a positive attitude toward change. These initiatives are followed by the formation of leadership coalitions, communication of the vision and strategy, and planning first successes.

Stage Three deals with designing changes. Included among its steps are the identification of constraints for implementation, providing target definitions to motivate, qualify and legitimize employees, and securing first success to verify the credibility of vision and strategy.

Stage Four is a planned and controlled implementation of changes. Complete implementation of a new vision and strategy can take as long as several years, so controlling the process is extremely important.

Finally, Stage Five will stretch over several years after completion and implementation of the strategy and involves reinforcement of changes. The task here is to ensure that changes are anchored into company culture.

A comparison of the Lewin-Schein, Kotter, and EFQM models is presented below in Figure 1.

Figure 1
Comparison of Models

Models	**Motivation**	**Change**	**Implementation**	**Post-Implementation**
Lewin-Schein	Unfreezing	Change	Refreezing	
Kotter	Steps 1, 2	Steps 3, 4	Step 5	Steps 6, 7, 8
EFQM	Stage 2	Stage 3	Stage 4	Stage 5

The following five points serve to summarize the models presented in this paper and serve as a condensed version of change management principles (Change Management, n.d.):

- At all times, involve and solicit support from people within the system.
- Understand where the organization is at the moment.
- Understand where you want the organization to be; when, why, and what the measure will be for getting there.
- Plan development towards where you want the organization to be in appropriate measurable stages.
- Communicate, involve, enable and facilitate involvement from people as early, openly and fully as possible.

The models presented previously address key areas that impact change but the authors believe the models can be enhanced by addressing the holistic nature of change, including that required by technology implementation. Thus, the authors propose an enhanced model, one that draws from these long-standing models and takes critical components that these models employ and makes them explicit, adding a particular focus on post-implementation follow-up and evaluation.

AN ENHANCED MODEL FOR MANAGING CHANGE

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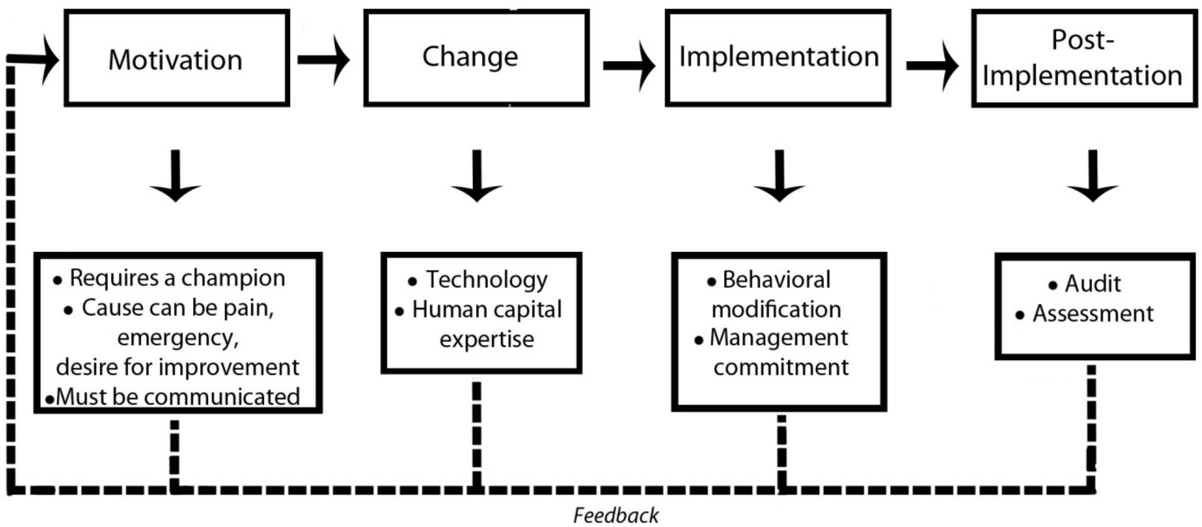
The proposed enhanced model differs slightly from the previously-discussed models and attempts to enhance the strengths. The above-cited models are based on steps that are relatively clear, basically providing a "roadmap" to change, and this format continues in the enhanced model. The enhanced model is based on steps for ease and clarity, addressing the challenges of the above-referenced models by incorporating a focus on the change itself as well as acknowledging that the motivation for change can encompass a variety of elements. It explicitly recognizes the importance of post-implementation evaluation and a feedback loop. Post-implementation evaluation of the change process allows managers to evaluate the success of the process itself, not unlike the evaluation of the introduction of a new system or product. It is critical to evaluate the outcome of the change process in order to assess the degree of attainment of the desired change.

Figure 2
Enhanced Change Management Model



As evident in the enhanced model representation, the authors of this paper strongly believe that organizational change is a continuous process. To that end, the revised model serves to enhance Stage Five of the previously mentioned EFQM Excellence Model as the authors feel strongly that continued emphasis must be placed on revisiting change to optimize results, considering change from a holistic perspective. The authors further suggest that feedback based on assessment should be utilized to measure the success of the change process. This feedback can serve to enhance the process at a managerial level, and it can also be communicated to those affected by the change to enhance their involvement and support.

Not only do the authors feel strongly about reinforcement of change to anchor it into organizational culture, they strongly advocate consideration of the model in an iterative framework. The iterative nature of the steps in the change models implies that managing change in today's organizations is indeed a continuous and ongoing process. While a particular implementation will almost certainly follow a schedule with a desired adoption period, the change involved in the implementation may continue past the introduction of the system, as is the case with a CRM system. Managing change effectively is imperative. As stated earlier, the manner in which organizations address change frequently "differentiates winners from losers" (IBM, 2009).

DISCUSSION AND IMPLICATIONS FOR MARKETING PRACTITIONERS

Whether change comes in the form of a crisis, a market shift, or a technological development, all organizations find it to be challenging (Baltzan & Phillips, 2010). Although many aspects of change management are fairly consistent from business to business, businesses are so diverse that it is impossible to design a single change management solution that can be considered effective or usable by all. Managing change depends on such variables as the size of an organization, the business processes involved in the change, and the organizational structure (Conrad, n.d.).

Successful change in organizations is the result of hard work. The selection and use of a process that suits the organization in question is extremely important. Careful planning and patience will help to improve the chance of success. When one looks at organizational change models, the piece that seems to get the least amount of attention is the post-implementation phase. There can be a myriad of reasons for that. One reason is that some are afraid of post-implementation evaluation because it may show that the full benefits of the change were not recognized thus rendering the change unsuccessful. Another reason is that organizational pressures simply indicate that everyone must transition to the next project in waiting, and therefore the current project is considered complete with no time for subsequent follow-up and post-implementation assessment.

As previously discussed, motivation for change can result from a number of factors, including pain, product improvements, managerial prerogative, or cost reductions. Statistics indicate that approximately 70% of all major change efforts result in failure (Kotter, 2010). The failure rate in part can be attributed to the lack of a holistic approach and the lack of post implementation assessment. In order to understand what was successful and what was not, a follow-up audit is imperative. Part of the audit is to ascertain which processes worked and which did not. Organizations need to understand that an audit should not be viewed as punitive; it should be viewed as an opportunity to gather valuable feedback from lessons learned that create an environment where failure is viewed as a means of providing a learning opportunity. In addition, it is important that the reasons for failure are not repeated. In order to improve the process of change outcome, continuous improvement reviews should be performed during the entire process, not necessarily only at the finish. If continuous follow-up reviews are conducted, false starts and erroneous paths can be avoided, and the change success rates improve.

An example of a technology-based change in a marketing context is implementation of a customer relationship management (CRM) system. Acceptance of business process changes brought about by the introduction of a technology-based CRM system requires effective leadership (Galbreath & Rogers, 1999). Leaders are responsible for setting the vision and strategic direction and also authorizing expenditures and motivating key personnel (Pinto & Slevin, 1987). Further, since CRM impacts many parts of the organization, Trepper (2000) and Girishanker (2000) suggest that a holistic approach be adopted for implementation. The enhanced change model presented in this paper with added emphasis on post implementation and follow-uplends itself well to the technology-induced business process change that results from a CRM implementation. The following example of change management necessitated by the implementation of a CRM system and an impacted business process and culture change scenario provides associated implications for managing change. As managers are confronted with the need to manage change in their organizations, guidance on change management that can be secured from models such as the enhanced model for change presented in this paper can facilitate implementation of new technologies and advances that impact marketing, customers, and sales.

CRM systems can provide significant benefit to organizations as well as require an investment of resources, yet Davids (1999) estimates the failure rate for CRM implementations to be greater than 65%. The implementation of a technology-based CRM system will almost definitely result in significant changes in sales, marketing, and customer interaction processes and will also result in a restructuring or significant organizational culture change. A likely result will be a change in the processes for dealing with customers. The marketing, sales, and customer service staffs must then deal with a technological change that impacts how they subsequently track and communicate with prospects and customers. Ideally, the full attention and endorsement of the sales/marketing/manufacturing/customer service and information technology manager is vital for successful implementation (Chen and Popovich, 2003). Zablah, Bellenger, and Johnston (2004) contend that the extent of alignment among employees, processes, and technology will play a vital role in end user acceptance of CRM.

Following the enhanced change management model, the sales/marketing/manufacturing/customer service managers begin by recognizing the motivation for the change and clearly communicating that motivation to the affected marketing and sales personnel. Concurrently, an organizational assessment must be performed to determine whether the human capital exists to execute the plan. Everything associated with the way sales, marketing, manufacturing, and customer service have been performing may change, and clearly there can be considerable resistance on the part of the affected parties. Significant process changes need to be clearly articulated and continuous performance reviews need to be established to ensure desired performance and success. There will normally be some resistance to change, but by clearly articulating the 'how and why', benchmarking and evaluating the progress, and continually assessing and rewarding success, managers can increase buy-in relative to the revised processes and, optimally, have all involved become part of the revised process, thus creating a climate for success. The emphasis on the recommendation for post implementation audits and assessment advocated in the proposed enhanced model as well as the Kotter model (2010) and the Lewin-Schein model (Luftman et al., 2004) become increasingly important as the organization attempts to solidify changes and make them part of the organizational culture. As stated in the EFQM Excellence Model (Pfeifer, Schmitt, & Voight, 2005), as well as Manzoni's Financial Times article (2001), full implementation of the new vision and strategy can take as long as several years.

Change is a dynamic process. It is also a process where lingering resistance can normally occur. By articulating clearly the 'how and why' for process change, implementing ongoing reviews and post implementation assessments, and then utilizing subsequent feedback as suggested in the enhanced model, organizational success with change management can be more attainable.

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