Papers

Change management models for workplace transformation

Alicia Mandel, Colette Temmink* and Martha O’Mara

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*Apollo Education Group, 4025 S. Riverpoint parkway, Phoenix, AZ 85040, USA
E-mail: colette.temmink@apollo.edu

Alicia Mandel is Vice President of Learning and Organisational Development at Apollo Education Group. Since joining Apollo in 2009 she works closely with Apollo executives on managing all large-scale change efforts. Prior to joining Apollo, Alicia was the acting CHRO and Director of Corporate Learning and Leadership at the US Olympic Committee. She has also worked in organisational development roles at American Express and Citibank.

Colette Temmink is Senior Vice President, Chief Administrative Officer at Apollo Education Group and leads the shared service organisation including the real estate and facilities functions. Her expertise spans all aspects of facilities, property and asset management, real estate transactions, large-scale complex redevelopments, strategic corporate planning and outsourcing contracting. Colette received her BSBA from American International College and her MBA from American University.

Martha O’Mara is co-founder and Managing Director of Corporate Portfolio Analytics and founder of Place Strategy Partners LLC. Dr O’Mara has advised on the long-range strategy of over one billion square feet of commercial occupancy for some of the largest corporate portfolios in the USA and globally. Earlier in her career she was Assistant Professor of Real Estate Management at the Harvard University Graduate School of Design. Her PhD, MA and MBA are from Harvard University.

Abstract

The purpose of this paper is to demonstrate how corporate real estate (CRE) leaders can proactively support strategic change efforts across a range of corporate initiatives, including workplace change. The authors demonstrate the effectiveness of applying deliberate change management models — in particular the ’eight-step process for leading change’ by John Kotter — along with a next-generation model to guide the change process. A staged approach that addresses emotional engagement is shown to be an essential element of the successful implementation of change. This paper combines a literature review, expert knowledge and case study data. To demonstrate the models in action, case studies of change initiatives at Apollo Education Group (Apollo) are examined and further illustrated using six Fortune 100 sized company case studies of CRE high-performance workplace implementation undertaken in 2011 by Corporate Portfolio Analytics. Using both sets of cases underscores the generalisability of the change management models. The findings show how change management processes that proactively incorporate emotional engagement can be effective in CRE initiatives and other corporate change efforts. Supporting or initiating
change management programmes is an important new domain of the CRE function because many operational and process changes impact the physical workplace. Engaging the emotional and operational elements of a change management effort is essential for success. This study is one of very few that includes actual case data about CRE change management programmes. In addition, this is the first paper to test Kotter’s model in the context of CRE practices.

Keywords: corporate real estate, change management, facilities management, alternative workplace, high-performance workplace, employee engagement

INTRODUCTION

The pace of change regarding how industries are structured and how companies compete and organise their work processes in response continues to accelerate. To help employees best cope with the operational and emotional challenges of change, many companies actively engage formal programmes to help manage the change process. These efforts often require corporate real estate (CRE) executives to play an integral role in leading or supporting change management because these changes often impact the physical workplace. This is a relatively new role for CRE leaders and one that requires developing expertise in organisational change management techniques. This paper applies a widely used change management model to examine the change management process at Apollo Education Group, along with examples drawn from other corporations, and demonstrates how a proactive change management process — with a clearly defined sequential process of change — can enhance CRE effectiveness. In particular, it shows how change management processes that proactively incorporate emotional engagement can be effective in CRE initiatives and other corporate change efforts.

Change is an integral part of life. Bob Dylan defines change best as ‘He not busy being born is busy dying’, meaning things need to change, transform or face oblivion. Organisations that ignore critical changes in their business environment eventually fail. Classic examples of failure to respond to change include film pioneers Kodak and Polaroid, early computer manufacturers Digital Equipment and Wang, and mobile phone manufacturer Blackberry. Successful response to change often includes changes to long-standing practices, such as reward systems, or altering how, where and when people work, as well as the technology and tools they use in their work. CRE executives are charged with providing workplaces that enhance the competitive advantages of their organisations, and are responsive to changes in strategy. This role also requires CRE executives to be more actively engaged in change management programmes and practices to support change.

The workplace is not only an operational tool, but a symbol of the corporate culture and something that impacts people on an emotional level as well. In particular, changing to ‘high-performance’ or alternative workplace practices that integrate technology, mobility and flexibility in how, where and when work is performed often challenges the status quo of ‘one person per desk’. Changing workplace practices and processes involves multiple challenges across the organisation, including cultural and emotional impacts, and requires an integrated approach to change management.

There does not seem to be existing research that ‘describes the full spectrum of change approaches, nor explains how or why managers and change agents adopt different change approaches’; however, a framework outlining the sequence of change management is an essential tool for implementing any workplace change. This type of model can provide a footprint or a ‘field guide’ to help leaders navigate through the
change. While leaders can choose from many change management models, the one that has stood the test of time and influenced others is the eight-step process of leading change developed by Harvard Business School Professor John Kotter (see Table 1). Kotter's model recognises that organisational change is emotional, operational and process driven. Moving too quickly towards operational change or focusing solely on the changing processes, while failing to engage in the emotional impact of the change on the workforce, will lead to failure. Full engagement at the intellectual and emotional level must be fostered. Kotter notes that a pattern he has seen in successful change is: ‘see, feel and change’. This means that, when the organisation can help people to see the problems, solutions and progress, it results in those people seeing something new that connects with them on an emotional level. These types of emotionally charged ideas are the key to behaviour change.

In a meta-analysis of change management approaches across a wide range of disciplines and literature, Young (2009) identified and organised them into similarities and patterns. The meta-model he proposed included steps to understand the existing pre-change environment, creating awareness and validating the need for change, developing and committing to an action plan, leading change, identifying and measuring results, and monitoring the ‘new normal’. This model reinforces the Kotter model and further validates the need for a change process that addresses emotional engagement.

At Apollo Education Group, change management is supported by dedicated corporate resources, including a Vice President of Learning and Organisational Development who reports directly to the Chief Human Resources Officer. The company has adopted a change management model that builds upon Kotter's and others' emphasis on emotional engagement throughout the change process. As described in Table 2, this model — called ‘Renewal’ and developed by David Oldfield — incorporates emotional words, behaviour and ideas that people can relate to and connect with on a visceral level from the beginning of the process and throughout the change experience. Apollo, like many other companies, recognises the importance of successful change. The for-profit educational industry is evolving and ever-changing, so it is critical to actively engage a proven and successful change management programme. As an example, while the company is still committed to providing quality, accessible education for individuals around the world, the needs of today’s learners have drastically changed. This includes technology investment, integration of advanced learning methodologies and

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**Table 1: Kotter's model**

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<th>Kotter's eight steps</th>
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<td>Step 1: Establish a sense of urgency</td>
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innovation through its global educational brands.10

THE EIGHT-STEP KOTTER MODEL
The Kotter model may not fit or enable success of every change management effort and may need project-specific alterations;11 however, the eight-step model, with its emphasis on emotional engagement, can be a useful construct for CRE executives to use to engage more proactively in the successful change process and to partner with and support business-driven change initiatives. In fact, according to Appelbaum et al. (2012), in Kotter’s recent book The Heart of Change he acknowledges: ‘the core problems people face while implementing his eight steps are never due to “strategy, structure, culture or systems”’, they are due to individual desires and abilities to change behaviour.12 To demonstrate the utility of Kotter’s model to support effective CRE change management, this paper draws from examples based upon several change initiatives at Apollo, as well as examples of workplace change efforts compiled from case studies of high-performance workplace implementation at other large corporations.

Step 1: Establish a sense of urgency
According to Kotter (2007), more than 50 per cent of the organisations he studied failed in this first step largely based on the ability of leaders to act as change agents.13 Leaders need to help individuals understand the ‘why’ of a particular need for change and this rationale needs to be clearly linked to business strategy. A sense of urgency also can be prompted by external drivers, such as an expiring lease, a change in business regulations, or a competitor’s actions. At Apollo, the first step of the Renewal model is called ‘truth telling’ — and it is where urgency gets established. Complacency with the status quo cannot and will not drive change. Leaders continually need to ‘tell themselves the truth’ about their industry, their competitive position, what their customers are saying, their results and other future-looking indicators. Companies implement multiple small, medium and large projects at any given time across the enterprise. Truth tellers can be found in many places: customers, students, employees or third parties. It is very important for leaders to understand the perspective of these individuals and to recognise the courage it can take to tell the truth. These truth tellers help to create the conditions to listen and adapt the business accordingly. In one example, Apollo noticed that employee turnover in certain positions was higher than expected. As part of the process to identify why that might be, the company examined many avenues — compensation, work conditions, manager support and employees

Table 2: Organisational renewal model adopted at Apollo

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<th>Apollo’s process steps</th>
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<tr>
<td>Truth telling: The ability to see different truths from all relevant perspectives (including but not limited to the customer, employees, leadership, shareholders, etc)</td>
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<td>Sacrifice: The ability to give something up in the pursuit of something new, making space for the change. To release with dignity that which is no longer vibrant</td>
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<td>Innovation: The new process, idea, mindset, structure, etc — the change</td>
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<td>Intentionality: The ability to stay focused on the new way, the new idea and the new structure, and not allow the organisation to move back to the status quo</td>
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feeling valued — because each has a hand in employee turnover. After listening to many organisational ‘truths’, it was determined that the reward and recognition programme currently in place (based on employee tenure instead of employee behaviour) was no longer sufficient in making employees feel valued (there were also other findings that involved compensation and the other factors mentioned). Company leaders listened carefully to all of the feedback and ultimately developed a new reward and recognition system specifically designed to value employee behaviour. This program, called EPIC, helps employees to identify with the company’s core values and calls out specific behaviours that are aligned to those values. Through this EPIC program, employees are able to recognise and be recognised by their peers as well as their leaders across the entire organisation for living the company’s core values every day. This includes appreciating and celebrating the achievements and contributions of individuals by allocating specific ‘points’ that can be collected and redeemed for meaningful rewards.

By creating an environment where truth telling was recognised and encouraged, Apollo leadership was able to see how reward and recognition serves as a key driver in employee turnover and employee engagement. The company was able to create a sense of urgency — which ultimately justified dedicating the budget to support EPIC — in a tough financial environment to drive a change of this nature.

Clear definition of a problem and its impact on the organisation can be supported by metrics. The truth can be in the numbers. One form of ‘truth telling’ most useful for CRE managers is clear occupancy and utilisation metrics. Apollo tracks several real estate metrics beyond these two that measure usage patterns, occupancy satisfaction and alignment with strategic objectives. Other companies have made similar efforts. As part of a change management programme implementing high-performance workplace practices, one company developed an ‘implied vacancy’ metric that used a more efficient space utilisation standard based on industry benchmarks. The results showed that only half of the company’s office space was actually required to support operations. As a result, 80 per cent of the existing leases were not renewed and the company back-filled mainly into existing owned properties.

Companies and company leaders often find it too difficult to spend time with ‘truth tellers’. They surround themselves with people who ‘tell them what they want to hear’, and therefore find themselves solving the wrong problems.

**Step 2: Form a powerful guiding coalition**

Sometimes change begins with the efforts of a few individuals and grows as time progresses. As the group or coalition grows, it should be led by respected representatives with enough power to take action and own the process from many parts of the organisation. Although the guiding coalition must include leaders of the organisation, it is also important to create a diverse team of champions made up of various stakeholders who need to be involved in the change process.

Apollo includes a ‘guiding team’ of leaders from different disciplines to run an operational steering committee when implementing large-scale projects involving high degrees of change. The operational steering committee must be credible, committed and supported by executive leaders to be successful. This includes buy-in to the ‘urgency’ that the executive team communicates. This also needs to be done through an analytical model instead of an emotional one. When the company implemented the EPIC program it identified two guiding teams. The first team was an operational steering committee focused on oversight of the strategic decisions and integration. The second was a cross-functional
implementation team designed to drive the vision through vendor selection, programme development and planning implementation. The high degree of integration and knowledge shared among these two collaborative teams was a critical enabler of successful implementation of the overall programme. There have been several examples of situations where key stakeholders were not ‘brought along’ through the process. That mistake led to extra time being expended throughout the process ensuring everyone was on the same page and bought into the change — during the change process.

Successful CRE change efforts actively engage human resources, technology and corporate strategy in the effort. CRE leaders who brought in important players from these disciplines early in the workplace change process had greater success in less time than those companies which saw their effort as simply a real estate cost-savings initiative.

Step 3: Create a vision
The guiding coalition needs to develop a clear picture of what the change will entail — a vision which can be articulated within a five-minute discussion. This includes ‘what, why and how’ a particular initiative or effort is being implemented. In addition, a vision centres on the exciting, new, innovative future.

In the Renewal model, the steps after truth telling are sacrifice and innovation. Sacrifice is a critical component rarely found in any change management model. It is the discipline that a company must have to look at the ‘new truth’ and ask ‘what is no longer relevant and what should be stopped’. Sometimes these sacrifices come in the form of reorganisations, sometimes consolidations or changes to the workplace. What is more, sometimes a company needs to sacrifice a current mindset or an approach. This tends to be a more emotional piece of the model because many in the company will be emotionally tied to ‘how things have always been done’. Sometimes the request to sacrifice is met with cynicism. Sometimes there is an underlying fear of letting go of old practices because employees are comfortable with them. For example, the reduction in individually assigned space in favour of more collaborative spaces often can feel like a personal sacrifice. Therefore, it is essential to provide a clear vision of how the individual will be better served by the new approach.

Apollo knew it would have to sacrifice the old reward and recognition system in order to develop a better, more relevant approach, even though it felt like a sacrifice to some employees. To address this directly, a vision was developed for the EPIC program from the truth-telling data and input that included frequent working sessions with ‘the guiding team’. This enabled the development of a solid vision: a vision for what the program would be, how it would work and the short and long-term program goals. This was then narrowed down to something simple but strong enough from which to make solid decisions. And to do that, it was important that leadership was able to draw the connection between the feedback they heard (‘employees need to feel more valued’) and the lack of ability of the current system to deliver what was required. The new vision in this model is called the innovation. It is what is being used to replace that which was sacrificed. In this example, the EPIC program was the innovation.

When implementing CRE initiatives it is important to provide a clear, concrete vision of any workplace transformation. The vision also must be flexible enough to appeal to each part of the business that is affected. For example, to help develop a clear message of the vision of what a new space design might look like, one company engaged an architect to conduct ‘visioning sessions’ with key managers. This effort also enabled the company to implement the new workplace design more quickly. For CRE programmes a common question is: ‘What will the space
look like?’ Some companies, including Apollo, use videos, renderings or actual piloted demo spaces to illustrate how the new workplace will operate and how it will look. Branding campaigns such as Apollo’s ‘MyWorkplace’ also can support a greater understanding and recognition of the holistic approach of the new space programme.

**Step 4: Communicate the vision**

Once the vision has been created, it is important to use multiple strategies to communicate that vision to stakeholders to help build trust and buy-in. Listening to stakeholder concerns and responding with creative solutions helps to generate trust. The vision must be clear, easy to understand and easily communicated. This includes details of the ‘what, why and how’, as well as using available channels and tools to communicate the new vision across an organisation.

When implementing large organisational changes, companies should build their communication strategy around its vision of the future. Time should be spent discussing why there is a need for change and the direction in which the company is going to increase urgency across the company. This should include developing a change plan that specifically addresses key stakeholders. Apollo goes through a process to identify all stakeholders and then figures out how each stakeholder specifically needs to be involved in the change, including how they need to be communicated with and what risks they might perceive as part of the change.

It is also critical to understand that all individuals go through change in different ways and at different paces. Some employees will get through a change rather quickly, while others will resist longer — depending on where they sit in the change process. Here, Apollo applies the change methodology referred to as ‘stages of concern’. This method helps leaders to identify where their specific employees are within the actual change process, and what they might be able to do to get them through the change more quickly. These stages of concern tend to be relatively consistent across changes and help to address employees’ specific concerns, allowing leaders to carefully plan for specific outcomes and timing relating to the change itself. Leaders and change champions should focus on communicating creatively, consistently and authentically with a sense of increased organisational transparency. This includes customising communications for teams and stakeholders to answer their specific questions and address their concerns.

For certain large-scale changes the company may choose to over-communicate. For example, for one internal project, Apollo held weekly calls where updates were constantly made, enabling leaders to understand progress against the goals. In addition, for the same project, there were also two director-level employee conferences and an internal website for employees that disseminated current information as well as received employee feedback. This allowed leaders to communicate back to the organisation with real-time updates and information and employee insights. There was also a team of leaders directly responsible for raising concerns, issues and shorter-term wins that were then reported to senior leaders. Finally, this step included establishing ‘champion groups’ consisting of employees at all levels of the organisation charged with gaining buy-in through their local influence.

It is essential to clearly communicate the benefits of a workplace change at the individual level and explain the rationale of the programme to help build trust. As an example, one CRE leader obtained senior level buy-in and then worked with each business unit directly to develop a charter agreement that addressed their particular business concerns. Answering ‘What’s in it for me?’ increases emotional engagement. One company interviewed by Corporate Portfolio Analytics helped incentivise
people to participate in a new workplace programme that required them to give up an assigned workstation at the office in exchange for a formal ‘work anywhere’ programme. This included developing a ‘calculator’ to show how much employees could save per month on commuting and other costs. In addition, company incentives were provided for technology purchases and reimbursement for internet and telephone usage.

A poor communications plan can lead to the failed roll-out of a workplace change programme. For example, one interviewed company’s guiding coalition did not explain why the company was transitioning to high-performance workplace practices. Rather, they just indicated that ‘the CEO wants this’, and moved for change too quickly. This lack of a clearly created vision failed to achieve the level of support required, and employees rejected the new office design. During the next change effort, the company did involve employees as stakeholders in the overall change process and achieved their buy-in prior to implementing physical workplace changes.

It is also critical to continue to communicate once a workplace transformation programme has gained traction. Many companies now provide training on how to work and manage in a new work environment. These training sessions, either conducted in person or online, not only facilitate a smooth transition to new work processes, but also help companies re-communicate the original vision to the team. This results in further framing of the new workplace as a change management programme that improves work processes, employee engagement and asset utilisation, rather than as a real estate cost-reduction activity. Such training initiatives also can improve the likelihood that high-performance workplace practices will become a fundamental part of the organisation and an enabler of competitive advantage.

Step 5: Empower others to act on the vision

Successful change accelerates as more stakeholders are engaged and involved. For this to happen, barriers need to be removed and participants need to be engaged in an action plan rather than focusing on negative emotions and how to resist the changes. In the Renewal model this is the last phase and is referred to as intentionality. In this context, intentionality means focusing on the original purpose of the change, what is being accomplished by the change and how to move forward to implement the change. Intentionality also needs to ensure the process does not stop based on certain negative emotional responses to change. After the first three steps (truth telling, sacrifice and innovation) have been done well, employees and the team must ensure that the new way of doing things takes hold within the organisation to avoid slipping back into the old way of doing things. For implementation to be successful some key questions must be answered. Which decision makers are responsible for which decisions? How do the teams work together? How is success measured? Without answers to these types of question, the level of ambiguity will make it easy for employees to slip into the old practices.

A large part of successful change implementation is ensuring that all leaders across the organisation are aligned on the vision and the purpose for the change, and remain focused on the new behaviours. To this end, at the start of a project it can be beneficial to have a ‘leadership alignment session’ to provide leaders not only with the applicable information on the change, but also some tools to help them lead differently throughout the change process. Leaders who are asked to drive a change must be given the tools and guidance to understand the broader vision or empowered with the responsibility to make decisions aligned with that vision. This can be seen in the program monitoring data to ensure performance. At Apollo, the
initial high-performance workplace pilot was adopted successfully by the original test group. As time progressed the unassigned space became desired by many other groups given the increase in collaborative space. As density increased the common space began to be used by many different groups and the ‘intentionality’ of the pilot space changed. Eventually, the small, original, pilot group was relocated to another space.

For CRE programmes, the guiding coalition should focus on work process improvement and identify functions that could benefit from high-performance workplace practices to serve as early adopters to help make the vision a reality. One company suggested that a group of 200–500 employees was a good target population when starting a workplace change management process. Some companies found that referring to early projects as ‘pilots’ undermined the overall message of a permanent change, and instead presented the change as a phased approach.

Certain job functions such as administration support, technology and engineering are well suited for high-performance workplace practices. For example, one company worked with information technology employees as early adopters. Another company helped to create momentum by engaging its consulting division that was requesting a work from home option. While management was initially concerned about morale and productivity, they gave it a chance due to the significant real estate pressures they were facing due to growth. These employees were able to work from home and retained hotelling space in the office, allowing the company to avoid increasing its real estate footprint. In both instances, the needs of the employees were aligned with the workplace change. At Apollo, the company conducts a formal assessment process to identify which groups or individuals are suitable for early adoption of new practices. For example, with the company’s alternative workplace programme, this included a detailed evaluation of how certain groups use their current physical space, job functions within the group and collaboration needs, and then the implementation was designed into stages to build upon success.

**Step 6: Plan for and create short-term wins**

This step in the Kotter model includes planning for short-term performance improvements or wins, and then documenting and communicating the benefits achieved by early adopters to help generate excitement and momentum. Kotter (2007) suggested recognising and rewarding employees involved in the change process at this stage. The EPIC program was designed as an ongoing enterprise tool to recognise and reward employees; however, from a project perspective, while the tool has been officially rolled out, the company continues to focus on new pieces of the program, features that will be deployed gradually until fully implemented. This allows the team the opportunity to understand how each phase is being rolled out, learn from it, and move forward again. As with any project plan, it is important to create specific milestones that include ‘near and clear goals’ and real-time progress reporting on the project’s longer-term milestones. The goal is to ensure the company does not stop short of the full implementation. The company also can use the low-hanging fruit as short-term wins. It is not only about short-term milestones; ultimately this is what drives longer-term, sustainable performance deliverables to which leaders, the project teams and employees themselves will commit and ultimately embrace.

Because Apollo carefully followed the change management process that was outlined based on the Renewal model, the EPIC program had outstanding overall usage upon roll-out. The adoption rate was higher than expected and, according to Andrew Webb-Peploe, Senior Client Success Manager from the EPIC software provider, Achievers: ‘fell
into industry-best-practice range’. While it is still too early to tell how the program impacted upon overall employee turnover numbers, the indicators noted above would certainly suggest a positive impact.

CRE groups have successfully implemented high-performance workplace programmes by highlighting early wins that bring savings, increased employee productivity and satisfaction. A key to success was having multiple sources of performance measurement — individual, organisational and real estate-related. Choosing the right groups to showcase a change increases the chance of continued success.

**Step 7: Consolidate improvements and produce still more change**

Kotter (2007) warns that business leaders should not be too satisfied by early wins and must continue the change process until it becomes the normal way of doing business and part of the company culture. This parallels ‘intentionality’ as described in the Renewal model. In addition, Kotter (2007) suggests that leaders can use the increased credibility and success from short-term wins to build momentum for larger system structures or policy changes. Leaders must understand that, for the change to be sustainable, they must ‘stay the course’ and not revert back to old practices, even though in some cases that might be easier. Most of the CRE change management efforts profiled in the research were still in the process of rolling out high-performance workplace initiatives across their organisations, and applying what they learned to improve future projects. All of them carefully sought ways to continually improve their approach as they expanded their programmes. One company noticed that one business unit always asked for more space than they ended up needing. They now build-out less space than is actually requested and incorporate flexible work practices to increase capacity when needed, while waiting for actual demand to be documented before they add additional space. Another company became concerned that mobile workers were not fully integrated into the culture and is now implementing policies such as requiring employees to come into the office for a certain number of times per week or for certain meetings. Others realised that there were geographical differences in how people used drop-in spaces. Another company noticed that different issues arose when transitioning new or existing employees to high-performance workplace practices and that different policies were needed to respond to both types of employee. The ability to make adjustments based on feedback fosters continued improvement which helps to advance the overall change goals.

**Step 8: Institutionalise new approaches**

During this final step, Kotter (2007) advises leaders to focus on communicating the connections between the new behaviours and corporate success to institutionalise the change. Once the EPIC program was rolled out and embraced, it was then time to add new components to the system. For example, the company is now integrating its corporate wellness and corporate social responsibility programs into the EPIC platform. EPIC has become part of the culture of the company and how it does business. Many of the companies profiled by Corporate Portfolio Analytics also identified milestones that indicated that change was becoming standard practice. For example, one company considered its high-performance workplace strategy to be clearly established when an individual, dedicated workstation became the exception, rather than the norm. Furthermore, the change process is ongoing and can take a considerable amount of time — even years — to realise. Skipping steps or rushing the process often results in failure. Several of the CRE case study companies struggled with early workplace projects because they tried to do too much too soon.
CONCLUSION

A review of various models of the change process has found strong common elements in the need both for emotional engagement and a deliberate, multi-stage process that enables open discussion and broad outreach. The implementation of new reward systems and workplace practices maps to established models for implementing change. All of the cases examined validated the need for a deliberate change management process that recognises change is an emotional process as well as an operational one, and successful efforts include both these elements. These case examples demonstrate that change management is an ongoing process which benefits from a thoughtful and deliberate staged approach, even when those stages bring discomfort to the status quo, and require more time devoted to the effort. There is no 'quick fix' to achieving substantive change.

At Apollo, the Learning and Organisational Development team continues to pay attention to what works and what does not in terms of implementing large-scale change. There is a constant focus on learning from mistakes and leveraging what worked well from previous change efforts. While organisations and individuals within those organisations go through predictable stages when implementing change efforts (as documented by both the Kotter model and the Renewal model), each change is different, drives a different vision and has a different set of stakeholders, therefore, each change needs to be managed as a new and exciting initiative.

As change management becomes an essential component of effective CRE management, these models can serve as a useful guide to long-term successful implementation of various change initiatives, including high-performance workplace practices. CRE managers will be well served by becoming familiar with the application of change management models and understanding that workplace change is a complex process. Success requires paying attention to emotional engagement and buy-in as much as completing projects on time and on budget.

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