Leading Your Team through Change

New software affects the day-to-day tasks of a person and requires building new skills. Managing this "people" side of change is formally called Change Management. While Blackbaud provides a wealth of guidance around Change Management, your Customer Success team has compiled a list of valuable insights to help ensure your team is ready and on board.

Focus on the Why

The decision to change from one software to another is just the first step of many to make it happen. When the project tasks and readiness start to overwhelm any team members, it's useful to recall what led your team to decide to make this change at the start:

- Has your organization outgrown your previous solution?
- Have there been blockers to new streams of revenue?
- Are there reporting challenges, leading to manual work?

Examine the Larger Vision

Your organization decided to invest in a new solution to achieve some big goals and priorities. Do you have an upcoming fundraising campaign? Anniversary or key milestone? Or there could be a long-term vision from leadership that starts with this solution being put in place. While it's easy to get busy with project tasks, it's helpful to zoom out to the bird's eye view of the big goals for your organization.

Communicate, Communicate, Communicate!

A typical project plan from your Blackbaud Project Team includes consulting sessions and other meetings to continue to achieve key milestones. However, your Project Team Lead for your own team should plan internal meetings throughout, ensuring everyone is on the same page and prepared to move into the next phase of the project. The simplest way to resolve issues or concerns from employees is to catch these things early, and an open door of communication is the best tool in the toolbox.

Keep Everyone on Track with Training

Although each team member is required to build new skillsets for the solution, this doesn't mean other job responsibilities stop. It's all too easy to focus on other tasks while training courses sit unfinished. A Project Team Lead should oversee timelines and schedules for training to ensure everyone stay on track to complete training before go-live. Here are some key topics to consider:

- How many people need training for this new software?
- What do you need them to learn?
- How will you track training progress?

Go-Live is *not* the Finish Line

The end of your project and *going live* is worthy of celebration! However, your team is still learning about your new solution. Give everyone an equal amount of motivation to keep learning and grace as new habits are forming.