

**50 Ways to Lead Your Users:**  
Driving Cultural & Operational Change

**A PLANVIEW WHITE PAPER**  
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## Background

It's almost a cliché. People, process, and technology—the three organizational elements that are indelibly linked and by which we must evaluate any change. Yet, so few organizations look at all three harmoniously when they consider adoption of new software or processes. The “people” aspect can be the trickiest. If you implement new software, what if they don't use it? If you introduce a new process, what if they don't embrace it? Or worse, what if they resist it to the point where they sabotage the new process, either consciously or subconsciously? Old habits die hard.

There are ways to implement new technology and processes that address the people side of the equation quite effectively. It can make all the difference in whether your people embrace or resist your initiative. In 1975, singer-songwriter Paul Simon released his hit song “50 Ways to Leave Your Lover.”<sup>1</sup> The song tells the tale of a woman offering a man advice on the many ways to break up with his girlfriend. She tells him the answer's easy if he takes it logically, and that there must be 50 ways to do so. And then she goes on to recite a few of the 50 ways. In this same spirit, this white paper introduces 50 ways as well; not to leave your lover, but to lead your users to a new paradigm in technology and process. Unlike the song, however, some of these ways defy logic. They escape conventional thinking. But they have been proven to work time and time again.

People in leadership circles often speak of culture change. Yet many of the changes required are operational in nature. Changes can also be related to communication strategy, goal alignment, understanding what makes people tick, and other topics. To give some sense of order and to categorize the suggestions, this white paper is organized in three parts:

- **The Planning: Strategies for Success** offers practices you can implement immediately that will get your initiative off on the right foot. Steps taken here will make your job easier as you get further in the process.
- **The Message: Getting the Point Across** outlines how you can best frame and then communicate your message in a way that grabs people attention, and more importantly, their interest.
- **The People: Driving Engagement** suggests tools for getting people actively involved, motivating them to stay involved, and removing the barriers that cause resistance in the first place.

And now, sit back, relax, and get familiar with 50 ways to lead your users to cultural and operational change. It can make all the difference in a having a smooth implementation or a difficult one.

*1 Simon, Paul. "50 Ways to Leave Your Lover." Still Crazy After All These Years. LP. CBS, 1975.*

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### I. The Planning: Strategies for Success

Use these strategies to get off on the right foot from the very beginning. Time spent here will save an exponentially greater amount of time later.

1. **Don't Kid Yourself.** Understand that mandated value and mission statements do not drive behavior in themselves, nor do written policy manuals. And the more they are created in a vacuum and then "announced," the more they'll be ignored by the general population. Instead, engage people in defining the desired culture and key success criteria; assess the current state; identify the gaps; and explore methods for influencing behavior, many of which are outlined below.
2. **Ask "Why are we here?"**- Not existentially, but what are we trying to achieve? For whom? When? In what order? What benefit are we aiming for? What's the benefit of the benefit? Why should anyone care about this? These are the root questions that will formulate the entire communication plan.
3. **Be Narrow-Minded** – Einstein said "Confusion of goals and perfection of means seems, in my opinion, to characterize our age." It also characterizes most implementations. Never confuse goals with solutions. Always start with a clear purpose—a singular call to action. Drive alignment around those goals, and the measurable objectives that will support them. Select just a few metrics and targets so as to narrow people's focus and not dilute the effort. Aim for one major goal at a time if possible. Author Patrick Lencioni declared in his book *Silos, Politics, and Turf Wars*, that a singular call to action—a rallying cry—is vital for breaking down silos and unifying your organization.
4. **Take Baby Steps** – Don't try to boil the ocean. Aim for piecemeal achievements that can serve as "quick wins" and build confidence. Try to have a series of short to mid-term goals. Perhaps start with a smaller group and/or begin with a limited scope of effort. Then move on to the next group or goal. Napoleon once said he'd rather have part of a canal completed every year than to have to wait ten years for a grand canal.
5. **Check Your Pulse** – Before embarking on a journey, it's a good idea to get a health check. This is true for organizations as well. The goal is to assess whether the organization's behaviors are in line with its stated intent. There are diagnostic tools and other assessment methods that can reveal—by region, department, management level, and other demographics—how well the organization mirrors the key success factors and stated values put forth by its leadership.



**Bonus tip!** In the book *Delivering Happiness*, Zappos CEO Tony Hsieh shares how he had employees at all levels contribute their honest opinions of what it's like to work there, and assembled the results *unedited* in an organization-wide Culture Book. The book, which gets revised regularly, is a powerful and low-tech way of getting a true picture of your culture, and sends a strong message of transparency and trust.

6. **Be an Anthropologist** – If you are about to implement a new process or software application, why not observe the people who will be using the new method and see how they operate in the current environment? See firsthand what they're dealing with, and get a better sense of how they'd operate with the new method. The Japanese have been doing this for years with great success (e.g. Toyota's *Genchi Genbutsu* approach, which means "go and see you yourself," or Honda's *Sangen Shugi*, which means "three actuals" for actual place, parts, and client). Don't forget other geographic regions and cultures as well.

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7. **Broaden your View** – No system or process operates in a vacuum. Take the time to widen your lens. Assess the impacts on individuals, departments, and the overall organization. Make tradeoffs if needed. Likewise, examine how all related operational components support your desired culture or method, including processes, services, technology, policies, and so on.
8. **Be an Explorer** – Be a connoisseur of the possible. Don't just look for "pain points," look for opportunities. Often, technology brings opportunities that people never would have thought to state as a need. Henry Ford said, "If I asked my customers what they wanted, they would have said a faster horse." It's good to assess what a customer wants, and even better to assess what they *need*. But don't overlook what's possible, even beyond their wants and needs, especially if it can create a better way of doing something. This can also serve to generate excitement about your initiative, if done for pragmatic purposes.
9. **Be a Community Builder** – A long-standing axiom across many religions and secular communities is *belonging, believing, behaving*. The key point is that belonging must come first. Then it becomes easier to work on shared beliefs and drive expected behaviors. The three are connected, and any one area will suffer without strength in the other two areas.



**Bonus tip!** Many business organizations are now forming "Communities of Practice" or CoPs—a term coined by cognitive scientists Jean Lave and Etienne Wenger, though the concept is ages old. A CoP is a group of committed practitioners with a shared passion for a topic or skill that learn collectively how to do it better as they interact regularly. Many organizations create multiple communities around different topics. It's an excellent way to get people actively engaged, increase ideas, and advance good practices.

10. **Scout for Landmines** – Change is rarely neutral. Problems will inevitably occur. Just like a military leader scouts for landmines or enemy troops, anticipate resistance and develop strategies to address it in advance. Develop a stakeholder roadmap to give a sense of where the resistance lies. Look at both the *impact* to each group and the *influence* they carry to develop a strategy for each segment. Focus first on addressing the high impact, high influence areas. These areas may require a face-to-face campaign or even one-on-one sessions. For certain high-influence individuals, you may need to assess their specific needs, concerns, and requirements as well.
11. **Think Small** – Sometimes, minor things can get people excited about your initiative or make a statement about your culture. Try to think of small, easy things that will generate a buzz. At its theme parks, Disney encourages its employees (called "cast members") to aim for *little wows* at every customer touch point—those small things that aren't "needed" or "asked for," but are inexpensive to deliver and serve to generate excitement (e.g. housekeepers shaping guests' towels in the form of Disney characters, random cast members asking guests where they're from, and so on). What small practices can your team employ to reinforce your desired culture or make people look twice?
12. **Build a Compass** – At Southwest Airlines, all employees know the overarching priority is to be *the* low cost airline. At Zappos, the employee culture comes first, then the customer, and then efficiency. At all Disney theme parks, they have prioritized service standards (four, to be precise, in descending sequence: safety, courtesy, show, and efficiency—each one can be trumped by the ones above it). In all these cases, employees have a small set of priorities that serve as a compass when making decisions and taking daily actions. This also serves to avoid micromanagement. Try to think of just a few guiding priorities to unify your people toward a common cause and guide their daily activities.

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13. **Throw a Process Party** – An end-to-end implementation process has many role players each with their own focus and interests. This can lead to redundant or overlapping processes and other inefficiencies. To assure a lean, efficient process, it's well worth the time to gather representatives of each party in a room and map out the overall process on the wall. Often, it's an eye-opener, and great improvements can be made.
14. **Be Inclusive** – Forward-thinking organizations find ways to include the voices of all their employees, even those whose role might seem unrelated to the task at hand. Some organizations have daily or weekly brainstorming sessions on different topics, rotating attendees from throughout the company from all levels. This not only helps people feel they're being heard and makes them feel a part of something; it also serves to bring in new ideas from fresh perspectives. Plus it raises their performance to peak levels because of the psychological impacts of being paid attention to. This is known as the Hawthorne Effect, based on experiments at the Western Electric Hawthorne Works that demonstrated that positive involvement, recognition, and a sense of belonging were key to worker productivity.
15. **Think Glocal** – *Glocalization* is a concept that encourages consideration of local and regional nuances while still remaining aligned with global themes and drivers. Experts now suggest going one step further—to delegate development of local or regional themes and practices that speak to that geographic or functional culture, yet support the overall global initiative and allow for global communication. The idea is to leverage the domain experts as much as possible instead of making assumptions that may not be accurate for that region. Sharing of good ideas across regions is vital as well. As the saying goes, "A rising tide raises all ships."
16. **Assemble Your Champions** – It's time to assemble the visionaries and aficionados that will serve as your champions throughout the implementation process. These can be business representatives with a keen interest in the outcome, or it can be team members who are passionate about the initiative. The champions are the ones who will make sure the job gets done right. Don't be afraid of heroes either. Some organizations try to avoid a situation where just a few people are doing the bulk of the work. Yet, throughout history, most major accomplishments were driven by a single catalyst or a small group of people.
17. **Choose Your Leaders Wisely** – When faced with a large endeavor and few good leaders, resist the temptation to take your star performers and make them leaders. Often it does nothing other than rob your organization of good performers and provide poor leaders. A good performer does not a leader make, as owners of sports teams have learned when selecting coaches. Change leadership is a unique skill that requires the ability to empathize, sell, delegate, influence, present, facilitate, negotiate, coach, and solve problems. In some cases, a core leadership team is needed to cover all these skills.

## II. The Message: Getting the Point Across

Now that you've developed your success strategies, use these practices to communicate your message clearly and effectively, in a way that will inspire passion... or at least understanding.

18. **What's the Problem?** Focus on *why*, not *how*. People need to understand the problem they're being asked to help solve through their participation and/or cooperation. To assure you're selling the true problem, keep asking yourself "why" until you get to the root of the problem (Peter Senge, author of *The Fifth Discipline*, calls this "the five Whys"). Once people understand the *why*, they'll more easily embrace the *how*.

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19. **Keep it Simple** – Don't bombard people with long emails that incorporate multiple messages or instructions. Don't roll out a series of ten metrics for people to strive to meet. And don't have a long list of goals that the initiative is supposed accomplish. Focus on one key message with two or three supporting points that augment the main theme. Then, in another communication, another message can be addressed. In *Selling the Invisible*, service marketing expert Harry Beckwith tells us it's imperative to say one thing—and one thing only. "Saying many things" he says, "usually communicates nothing."
20. **Consider the Alternative** – Management guru Tom Peters said, "If you don't like change, you're going to like irrelevance even less." It's often effective to convey an alternate reality to people, depicting what life would be like if the change is not implemented. Consider both the short-term and long term impacts. People like to have choices. In order to see value in something, they like to know the value in comparison to something else.
21. **Say Something Different** – Marketing expert Seth Godin wrote a book called *Purple Cow*. The idea is that by jolting people awake with an unexpected message or product that stands out (much like a purple cow would), people will be drawn to take notice. Try to find something unique or different to say that people haven't heard over and over. You may actually find them listening.
22. **Say it Often** – Communicating a message once may or may not reach people. But if they begin to see the message reinforced in different ways, through frequent tips, internal media, and success stories, it will gradually begin to sink into their psyche. And if they begin to see tangible results from the change, all the better. Repetition over time induces change much like water can wear down a rock.
23. **Back it Up** – People want to know your message is credible. Try to offer facts, figures, and proven examples that will make what you're saying indisputable. Practice what Stanford professors/authors Jeffrey Pfeffer and Bob Sutton call *evidence-based management*, making decisions based on sound evidence. But beware. Benjamin Disraeli once said, "There are three types of lies. Lies, damn lies, and statistics." Make sure your "evidence" is applicable to your organization's situation.
24. **Tell a Story** – Anyone who has ever moved the masses did so with stories, either real or fictitious. Business organizations are finally beginning to understand that, and storytelling classes are a hot commodity in leadership circles. Whether it's a sad story of failure, a motivational story of triumph, or a series of little stories from your organization or elsewhere (whether good or bad) to help express a desired behavior, stories can move people much more than rules or instructions. Use stories to spread excitement and drive new behaviors.



**Bonus tip!** In their popular book *Made to Stick*, authors Chip and Dan Heath combine a number of our tips, suggesting that the best way to make a message stick is to make it a simple, unexpected, concrete, credible, emotional story (which conveniently spells out SUCCESS).

25. **Paint a Picture** – Some people are visual—especially executives, who rarely have time to digest a complex message or read through reams of documentation. Find a way to convey your message in visual terms, through graphics, diagrams, charts, or pictures. But, as information presentation guru Edward Tufte warns us, don't simplify the message to the point where the meaning you are trying to convey is weakened or muddy. Effective visuals, he points out, show clear causality, have annotations to explain key points, show quantitative data (if applicable), and avoid useless or non-informative clutter. Most of all, they must answer the right question.

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26. **Be Transparent** – Be forthcoming about who is helped by the change and why. Some changes bring organizational efficiencies, and not necessarily individual efficiencies. People will generally be only thinking of the change's impact to their own role unless they're adequately informed of the overall benefits of the change. Get resistance and concerns out in the open, and address them publicly. The more you acknowledge concerns and address the ones you can, the more comfortable people will become with them. Silence breeds resistance. So do superficial or deceptive messages.
27. **Be a Servant** – Two things that bring people together are a common enemy and a common cause. Why not bring your people together in the interest of the end customer? If done with integrity and credibility, stressing the benefits for a third party can help convey a need for sacrifice and get people working on the same side. Just be sure it's sincere and accurate. People can tell if they're being manipulated.
28. **Ask for Help** – Whoever the beneficiary of the change is, when communicating the desired new approach, try framing it as a call for help rather than a mandate. People by nature want to help others, and typically respond more favorably to requests for help than demands for action. If possible, try to stress each group's specific role in making the new state successful. This is especially vital for international colleagues that may or may not appreciate the need for the change.
29. **Watch Your Language** – When it comes to culture change, language matters. Replace negative language and labels with constructive questions terminology. Instead of "That won't work," try "How can we solve the xyz issue?" Instead of "They're just being difficult," try asking "How can we best address their concerns?" It's a matter of framing the challenge in a constructive way to turn naysayers into problem-solvers. Also, to illustrate your points, try to avoid abstract concepts or beliefs and instead focus on concrete examples. People have a hard time interpreting abstract concepts like integrity, trust, and complexity.

### III. The People: Driving Engagement

Despite the most thoughtful strategies and clear, compelling communication, ultimately it is the ability to understand and lead people that will make or break your change initiative. And the best way to do that is to actively engage them. Some of the following tips are people-focused, and some are operational. But all of them are designed to drive engagement.

30. **Don't Dictate, Co-Create** – Ernest Hemingway once said, "The best way to find out if you can trust someone is to trust them." Likewise, the best way to get people more engaged is to engage them. Instead of seeking compliance, seek engagement. Find ways to involve people in the design of your change, and they'll be more likely to follow it later. Peter Scholtes, quality management guru and author of *The Team Handbook*, endorses this approach, saying that people will be more apt to observe standards they've helped create. If you can involve customers, all the better.
31. **Influence the Influencers** – In any organization, there are those who set the norms, the everyday behaviors that define the culture. Rarely is this senior leadership. In his book *The Big Picture*, education reformer Dennis Littky shows how he achieved dramatic change in his hugely successful network of schools. He noted that, in any school, it's not the teachers who set the culture, nor is it the principle. It's the senior students. And so, he engaged the senior students in bringing about the culture change he wanted. It worked like a charm. Who sets the norms in your organization? Is it middle management? Certain influential employees? Whoever it is, try to solicit their help in driving the new culture. You may be surprised by the results.

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32. **Brand it!** – Why do sports teams wear uniforms? Why do doctors wear scrubs? Why do corporations have logos? Why do associations have membership cards? Besides the more practical reasons, a key element of all of these is *identity*. Each of these is meant to instill pride. If appropriate, consider branding your initiative with a catchy name, and giving people a sense of identity with it through t-shirts, mugs, pens, or other items that can make them feel “part of the club.” If desired, even a result or cause can be branded, rather than the project itself (e.g. using a “90” to signify a milestone goal for 90 days, etc.).
33. **Make it Fun** – Mary Poppins was right. A spoonful of sugar *does* help the medicine go down. No matter how challenging, why not make your initiative fun, with rewards, contests, celebrations, and other activities that get people excited and looking at things in a positive light. Be careful about doing too many things after hours though, as some people just want to get home to their families. Also, beware of making the assumption that adding some fun activities to an otherwise negative environment will be perceived as positive. To the contrary, it can be perceived as putting lipstick on a pig. But when fun is supported by an overall positive climate, magical things can happen.
34. **Aim for Small Teams** – Research has shown that small teams tend to be more focused and accountable than individuals or large teams. Consider creating sub-teams to undertake certain aspects of your initiative. How small? Two is not enough diversity. Four can lead to taking sides. Three may be adequate for limited efforts. Most experts agree that five to nine is the ideal number for larger efforts, and that large teams should be broken into smaller teams of this size. Some suggest that an odd number of people will avoid ties during decisions, while others prefer an even number to allow for partnering within the team.
35. **Be Well-Rounded** – Teams need to employ a variety of personas to be effective as a whole. In *The Ten Faces of Innovation*, Tom Kelley, of the award-winning design firm IDEO, suggests considering ten personas that span three primary areas: learning, organizing, and building. These personas, which range from caregiver to director to experimenter, can assure that multiple perspectives are considered. At the very least, your team should have people who are goal and results focused and those who are people and relationship focused. A lack of either should indicate a problem.
36. **Remember the Spaghetti Principle** – General George S. Patton likened leadership to trying to move a piece of cooked spaghetti. You need to pull it; you can’t push it. “A piece of spaghetti or a military unit,” he said, “can only be led from the front end.” This means you need to lead by example, relying on the new method as soon as possible. People observe management’s actions, not its words. If you’re implementing software, then ensure management uses the output to make its decisions. If management isn’t using it, the people will think it’s unimportant and will likewise ignore it.
37. **Just Do It** – Don’t wait for perfection. Even if the system, process, or data isn’t perfect yet, begin using it as soon as possible. The best way to move to a new method is total immersion (which is why foreign language schools use this approach). As the Spanish conqueror Cortés told his men when they arrived in Mexico, “burn the ships.” Only then will everyone be committed to the new way. Of course, be sure the new way is at least effective enough for use (80% is a good rule of thumb), but neither should you let the perfect be the enemy of the good, to paraphrase Voltaire. Let “good enough” be your mantra, or you may find yourself losing traction quicker than you think.

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38. **Make a List** – Never underestimate the power of checklists. Not only can they reduce the need for time-consuming approval steps, they can reinforce the basics, improve handoffs, and put accountability in the hands of the people executing your processes. Most importantly, they can greatly improve process quality. Airlines have been using checklists for years, and now hospitals are realizing their power as well. For example, in about a year's time, a single checklist implemented at Johns Hopkins Hospital had prevented forty-three infections and eight deaths, and saved two million dollars in costs.
39. **Standardize Selectively** – People tend to look at change as something that's been inflicted upon them. If they're required to do things differently or follow a standard process, they can feel like their freedom is being revoked, or their wings have been clipped. It can also make them feel less creative. Because of this, resist the temptation to standardize everything at once. Instead, pick one or two areas that everyone agrees need to be standardized or improved. Involve people as much possible. Then, after it's been implemented and embraced, you can move on to the next most important area. Combined with voluntary checklists, it's a great way to introduce improvements that people can buy into.
40. **Learn to Love the Trash Can** – Miyamoto Musashi, the greatest Samurai swordsman of all time, wrote a book called *The Book of Five Rings*, an ancient book on strategy, tactics and philosophy that's still revered today for its insights, and for Musashi's "nine principles." One of those principles is "Do nothing Useless." This principle became the basis for the lean manufacturing movement as well, which originated at Toyota. Toyota listed "seven wastes" to be eliminated in manufacturing. Likewise, there are wastes in implementation processes as well, including excessive approval steps, redundant actions, ineffective handoffs, unnecessary forms, gathered information that goes unused, and so on. When examining your processes, find out what steps, forms, data fields, or reports can be eliminated. Be relentless about waste, and question everything. Encourage your people to do the same.
41. **Train, Train, Train** – There's a well-known saying, "If you think education is expensive, try ignorance." Training is often overlooked or shortchanged, yet it's one of the most critical success factors of any endeavor. A lack of training will not only lead to mistakes, it can lead to frustration, negativity, and ultimately, apathy—all of which can spread like a wildfire. Give your people the right tools and training to thrive, and you'll boost your success rate exponentially. Plus, it's an investment that can pay dividends. In one sector, a recent study showed that those companies in the top 25th percentile in profitability spent a proportionately higher percentage on training than their less profitable counterparts.
42. **Be a Coach, Not an Umpire** – Focus on shaping behavior, not grading it. As noted British Professor Philip Grammage said, "Nobody ever grew taller by being measured." Make an effort to find out the barriers people are facing in adopting the change, and find ways to help them address those barriers. But be sure to practice situational leadership. Some people need coaching more than others. Some can be left alone. Your job as a leader is to know the difference.
43. **Forget the Golden Rule** – In *First Break All the Rules*, authors Marcus Buckingham and Curt Coffman suggest that one of the first ones to break is the "golden rule" (*Treat others the way you want to be treated*). Instead, they suggest treating others the way THEY want to be treated. Learn people's preferences for communication and guidance. Be flexible enough to adapt to different needs. This can differ by region, functional area, or other demographics. It can even differ by each individual. It's not only a matter of empathy; it will help you frame your communication to each party in a way they'll best absorb.

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44. **Watch for Jello** – It's been said that middle management is the "Jello layer" of an organization. Messages tend to get stuck on the way up and on the way down. Don't let your valuable initiative get stuck in Jello. Be sure your middle management is on board and acting in line with your desired culture. How will you know? In general, employee surveys, training, organizational diagnostic tools, policies, and general observation can help assure that your managers are on board and messages are being communicated both ways.



**Bonus tip!** Ricardo Semler wrote a book called *Maverick*, which details how he turned his company Semco into one of the most unusual, most profitable, and fastest growing companies around. As their culture is such a vital part of their success, Semco surveys employees every six months on how well their supervisors are living up to it.

45. **Re-recruit Good People** – Retention of top employees will be vital to your change efforts. Again, middle management is key. People generally choose to stay or leave a job based on their relationship with their supervisor. Meet with your top employees and make a special effort to address their concerns and make them feel an important part of the effort. Sports teams treat their star performers well. It should be no different in business.
46. **Ride Downhill** – Change is hard enough without making it more difficult by trying to fight nature. Make sure the people on your implementation team are working in their area of natural strengths. Some people are better at analyzing, some are better at leading, and some are better at communicating. Help them augment the skills they're already good at. And be sure those impacted by your change won't have to do something they're not fit for either, as a result of the change. As Robert Heinlein said, "Never try to teach a pig to sing; it wastes your time and annoys the pig."
47. **Build a Wall** – A wall of success, that is. Have a public forum, either online or on a physical wall, to recognize and appreciate any and all successes, no matter how small. Use it to generate excitement and to acknowledge people's efforts. It can also serve to inspire others to follow suit. When Napoleon established the Legion of Honor medal in France, he said "A soldier will fight long and hard for a bit of colored ribbon." And he was right.
48. **Tear Down a Wall** – There are other types of walls in organizations that aren't so inspiring. These metaphoric walls are the barriers that prevent people from collaborating effectively and getting their work done. Find out what they are, whether it's inadequate collaboration tools, ineffective organizational structure, a poor working space, or policies that serve to disrupt progress. Make a point to find out the barriers that people face as they try to carry out your change. Then remove said barriers.
49. **Don't Be Afraid to Change Change** – No, that's not a typo. Sometimes, a change needs to be altered or even reversed in order to adapt to learnings as they emerge. The most innovative companies know this instinctively and experiment with different techniques. They're not afraid to adjust course if needed. For this reason, it's a good idea to test the change on a small scale. But even after change has been implemented broadly, if the results aren't what you expected, then don't hesitate to "adjust the sails." Don't be like the proverbial ship's captain who's veering off course but is expecting the lighthouse to move.
50. **Don't Stop Now** – Speaking of change, let's not forget what the Greek philosopher Heraclitus said: "The only constant is change." Once your change is implemented, don't stop there. Assess how it's working and then chart the next course. Make it bold or make it small, but do something. Life doesn't stand still, technology doesn't stand still, and your competition doesn't stand still. Good organizations adapt to change. Great organizations create change. Constantly.

### **V. How Planview Can Help You Lead the Way**

As we've seen, implementing new processes or software must be approached with care. Many business process and software initiatives falter because they are too difficult to implement or fail to provide enabling capabilities. Usually, this is a result of inadequate planning, poor communication, or lack of understanding about the people side of the equation. This is why Planview delivers solutions that combine software, processes, best practice tips, concept guides, templates, training, configuration support, advisory services, an online knowledge portal, and an implementation and adoption methodology to fully enable successful improvement initiatives.

All Planview® solutions are integrated with these supporting components to help you build process maturity and maximize your return on investment.

Planview offers portfolio management solutions that help organizations bridge the gaps between strategy, finance, and operations. Our portfolio-driven approach integrates ideation, strategy, operational planning, execution management, and finance in order to provide a crystal-clear picture of value delivery at all levels of the organization.

This unique focus on end-to-end portfolio management enables you to drive innovation and operational efficiencies—from the voice of the customer, all the way through to the delivery and measurement of value.

With this holistic, integrated approach, Planview can help your organization embrace change, create unity, and thrive in an environment that's defined by change.

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### VII. About the Author



Jerry Manas, Senior Editor at Planview, is frequently cited by leading voices in the world of business, which often reference his best-selling book, *Napoleon on Project Management*, particularly its core themes of simplicity and focus.

Throughout his career as an author, speaker, and consultant, Jerry has built a reputation for taking complex information and processes and making them clear and accessible.

His work has been highlighted in a variety of publications, including *Leadership Excellence*, *The National Post*, *The Globe and Mail*, *The Chicago Sun Times*, and *The Houston Chronicle*. He has written numerous articles and appeared on radio programs nationwide.

In *Napoleon on Project Management*, Jerry drew insightful parallels between Napoleon's strategic brilliance and success in today's organizational and business worlds. The prestigious Kirkus Reviews called it "the ultimate case study in effective project management." The book has been published in eight languages.

His book *Managing the Gray Areas*, which brought new perspectives on resolving the most common leadership dilemmas, was hailed by Pat Williams, Senior VP of the Orlando Magic basketball team, as "a new path for leaders."

Jerry collaborated with the Creating WE Institute on the bestselling book *42 Rules for Creating WE*, which reached #1 on Amazon in Leadership, Management, Motivation, and Organizational Behavior. His latest book, *Project Lessons from the Roman Empire* examines lessons in leadership and communication from the rise and fall of Rome.

Jerry is a founding member of **The Creating We Institute**, an international thought leadership community dedicated to fostering WE-centric practices through collaboration, research, and publishing. A prominent voice in the blogosphere, he is co-founder of the popular blog **PMThink!** and a founding member of the Project Management Institute's New Media Council, which keeps abreast of trending topics.

At Planview, Jerry applies his passion and expertise to developing best practices that help organizations achieve breakthrough performance across a framework of business processes and roles. He also is focused on creating communities of practice around topics such as innovation, capacity planning, portfolio management, project management, and more.

Jerry welcomes your comments and feedback. Contact him at [jmanas@planview.com](mailto:jmanas@planview.com)