Change management and professional organisations

Case study with AAT

Adam Harper

Karen Haynes writes: We've worked with AAT – the professional body for accounting technicians – since 2012. In this interview, **Adam Harper**, Director of Strategy and Professional Standards, explains how instigating a strong change function at AAT supports governance and business planning.

KH: *How did the change function at AAT develop?*

AH: As in many organisations, AAT's change function was small when it was introduced nearly a decade ago.

Prior to its creation the departments across the organisation operated their own project management (PM) activities.

There was no overarching governance or structure for prioritising competing demands on internal resources, such as ICT for example.

The delivery of a large infrastructure project – upgrading our database, finance systems and website – had shown the need for a new approach.

With the help of an external consultancy we established what a new change function should look like. We recruited to the Change Programme Manager position (which eventually morphed into Head of Change) and to a 0.5 support role.

The initial emphasis was on developing the governance framework – embedding controls. The change team worked with members of staff who had PM responsibilities embedded elsewhere in the organisation.

The next stage of development for the change function was more ambitious and involved greater centralisation.

It grew out of an organisational review. This had produced a new target-operating model based on 'centres of excellence'. We recognised that it would be beneficial to centralise the PM function, for two reasons.

First, to achieve greater levels of efficiency – cutting duplication and managing demands on core resources. The degree of localised decision-making was proving that you really can't do everything you want to do at the same time.

Second, to develop a broader view based on horizon-scanning, to enable better planning of resources. Having a clear view of how resources can be prioritised and deployed would enable closer alignment between project portfolio and business plan objectives.

KH: *How did you manage the transition to more centralised PM?*

AH: Removing elements of autonomy over PM inevitably led to some resistance in parts of the organisation. The necessary governance structures – clear processes and supporting documentation for standardised PM – also led to concerns that the changes were too bureaucratic.

We recognised that a careful balance between establishing structure whilst allowing delivery to happen was vital. In general terms, embedding the new approach represented a cultural challenge for the organisation.

We embarked on a process of showing the *value* of what was being delivered through the new change function: we focused on pockets of individual value realisation around the organisation and from these sought to create ambassadors.

We recognised that the culture change would take time and that the new centre of excellence would ultimately be judged by its ability to deliver.

KH: *And has it delivered?*

AH: I think so: we are much more confident about the rigour of our decision-making when it comes to business projects.

It's important to stress that the centre of excellence doesn't own the projects; they all have business owners from around the organisation.

The change team is there to provide facilitative support to the wider business. Project teams are comprised of staff from inside and outside the change team: those outside benefit from exposure to PM specialists with business-analytical skills.

I see the embedding of the change function as a two-stage process.

Stage one is implementing the governance infrastructure and supporting systems. That feels well embedded: we've built the infrastructure – governance is in place; departments around AAT are engaged in implementing cyclical programmes and making ongoing refinements; business-as-usual processes are working.

Stage two is the strategic contribution. We've reached a position where we're able to step back and look at how the change function contributes to AAT's forward agenda. What structures and processes does the business need from its functions to support its strategic agenda?

Stage two has the potential to take the value of the change team to a higher level.

KH: *For the change team, FJWilson has placed AAT's Head of Change as well as a Business Analyst, Project Manager, Change Programme Manager and a fixed-term BI Business Analyst. What's your experience of working with us?*

AH: FJWilson's level of understanding of how we operate as an organisation has developed over a significant period of time and involvement in a high number of appointments. FJWilson's support has been hugely beneficial. The number and quality of candidates that FJWilson have been able to identify is very impressive.

It's not just about finding the right technical skill sets – FJWilson also bring great value in their understanding for organisational fit.