

# How to manage people and change

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# Presenters

## **Sarah Charlton | Consultant | DG Legal**

Sarah has a BSc (Hons) in Applied Accounting and is a Fellow member of the Association of Chartered and Certified Accountants. Her career spans over 35 years working within the legal sector, fulfilling roles from COFA through to CEO. During her career she has worked with a number of legal regulators, professional bodies and government organisations. Sarah has been a member of the Institute of Legal Finance & Management throughout her career, qualifying as a Fellow member in 2005. Sarah also served as chairperson between 2010-2012 and continues to serve as an Executive Council Member. To view Sarah's full bio, please visit <https://dglegal.co.uk/the-team/sarah-charlton/>

## **James Wright | Consultant | DG Legal**

James' career in Legal Finance spans over 25 years, working in medium to large law firms, managing their legal finance functions. His knowledge and experience in understanding the SRA Accounts Rules has enabled him to provide extensive support to the COFA and build processes and procedures to enable compliance. James has also been a Tutor for the Institute of Legal Finance and Management for their Diploma course, which during his time saw the number of students passing their final exam rise 90%. James has also written practice and guidance notes both internally and for external clients and legal software providers. To view James' full bio, please visit: <https://dglegal.co.uk/the-team/james-wright/>

## Let's look at what we hope to cover!

- Introducing the change curve and the key stages of this.
- How you can recognise and influence each stage.
- Summary.





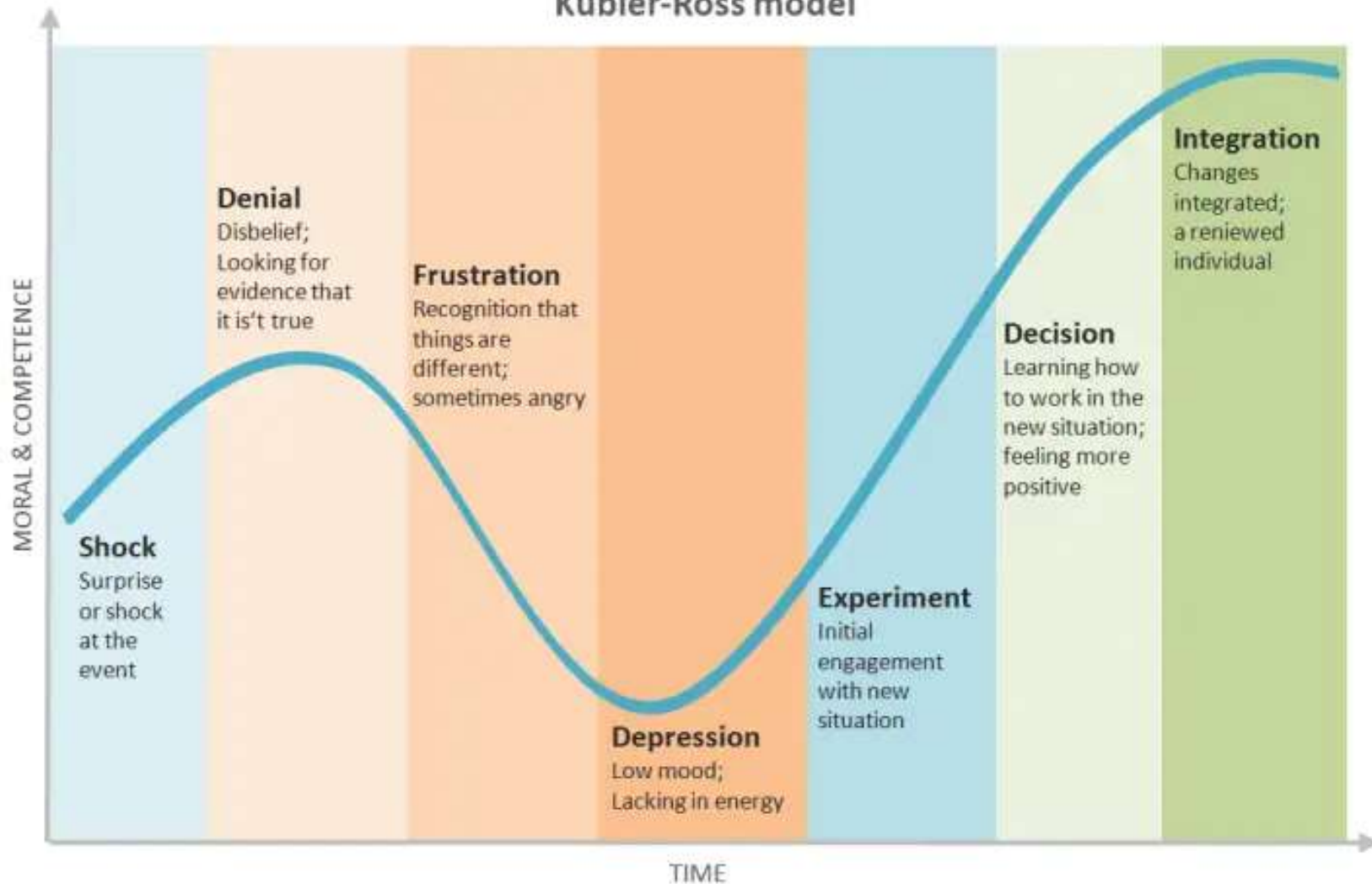
## Scenario

My name is Stefanie. I have been with the business for 35 years, working at the same desk/place for the duration of my time with the company, the view from my window is exceptional.

The firm are merging with another law firm and Stefanie will need to move to another floor to accommodate the merger.

**How would you go about advising Stefanie of this change? What should you consider?**

## Kübler-Ross model



# 1. What could you do to help mitigate the 'shock'?



- Pre-warning [where possible]
- Regular updates to reduce fear.
- An opportunity to be involved in the change [not always possible]
- Provide a count down [where possible].
- What happens if it goes wrong?

## 2. What can you do to speed up the 'denial' stage?



- Emphasise the need for change
- Reinforcing the expected results
- Sharing any adjustments that were made during the first few days
- Being observant and dispelling any rumours
- Offering training and support
- Corrective action (freeze, unfreeze)

### 3. How could you reduce the 'frustration'?



- Take time out to listen.
- Create a positive and supportive environment.
- Show empathy for their emotional journey.
- Be sensitive to the situation.
- Show that you do care.



## 4. How can you help staff deal with the 'low's?

- Continue to be inclusive even if it makes the meetings difficult.
- Allocate specific tasks or responsibility so they feel needed.
- Give Praise for the smallest of milestones.
- Again, regular communication



## 5. How to encourage experimental/exploration

- Planning and preparation for initial experience to be a positive one.
- Expose them to as many opportunities to experience the end result.
- Team culture.
  - Power and Influence
  - Buddying up
- Praise for trying



## 6. Decision

- Creating an environment where it makes it effortless to become accepting.
- Reinforce the positives.
- Again, communication to reinforce why they should accept it.
- Act swiftly and don't delay.



## 7. Integration





## Scenario

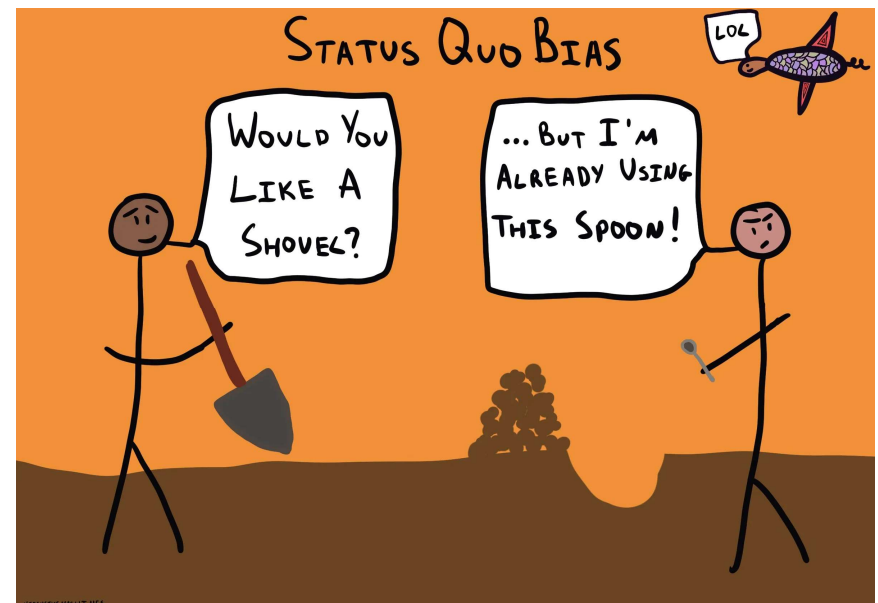
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**Applying the knowledge that you have just gained, would you make any changes to your plan?**

## Finally, we are all different!

- How we process emotions.
- How much time we will spend at each stage.
- What we place value on.
- What else might be going on in our lives
- How much change we are familiar with.





**T H E E N D**

The image shows the words "THE END" spelled out using six light-colored wooden blocks. Each block has a single letter in a bold, black, sans-serif font. The blocks are arranged in a single row on a light-colored wooden plank surface. The background is a soft, out-of-focus gradient of light blue and grey, suggesting an indoor setting with natural light. The lighting is even, highlighting the texture of the wood and the sharp edges of the letters.