

BUILDING A LEAN CHANGE STRATEGY

Moving from 'Idea' to 'Execution'
without the overwhelm



What is Change Strategy?

- **A clear direction for change:** Where are we going?
- **A set of key decisions:** What are we not doing?
- **A focus on outcomes, not activity:** Results matter more than 'being busy'.
- **A guide for action:** If it doesn't help you decide what to do on Monday, its not a strategy.

In a big corporate office, a strategy is a 50 page PDF that nobody reads. In an SME, that is a waste of precious resource: *time*.

A strategy is simply a map. It tells everyone where we are going and more importantly, how we have decided to get there.

Remember: **If it sits in a folder, it is not a strategy - it is paperwork.** We want a living guide that will actually drive daily decisions.



Good vs Bad Strategy

The "Bad" Strategy (The Noise)	The "Good" Strategy (The Signal)
Vague Goals: We want to be the best in our industry	Concrete Targets: Reduce customer wait times by 15% this month
Complexity: 10+ pages of jargon and synergy	Simplicity: One page, plain English, clear 'why'
Overloaded: 12 Priority 1 projects running at once	Focused: 2-3 must-win battles that move the needle
Passive: Sits in a digital folder, never discussed	Active: Discussed in every morning huddle

The Golden Rule

If you can't explain the plan to a new hire in under 2 minutes then it is too complex to succeed.

Too Many Priorities

Bad strategies try to fix everything at once because leadership is afraid to say no, but when everything is a priority nothing is a priority. Your team only has so much mental energy. If you give them 10 things to change, they will freeze. A bad strategy is a wish list, a good strategy is a choice.

Good Strategies

A good strategy drives immediate action. It tells the person at the front desk exactly what they should do differently when they pick up the phone tomorrow. It is the difference between saying 'we need to be more efficient' and saying 'we need to move all paper files to the digital drive by Friday'.

Step 1 - Define the Outcome

The 'Vivid Vision' Framework

- **What are we trying to achieve?** Define the future state in one sentence
- **What does success look like?** If I walked into the office in 3 months, what would I see that is different from today?
- **How will we know it is working?** Choose a clear measure of success.
- **The golden rule:** If you can't measure it, you can't manage it.

Vague vs Vivid

Vague: "We need to get better at digital marketing"

Vivid: "By Q4, 30% of our new leads will come from our website instead of word-of-mouth"

SMART Reminder

We have all heard of SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound) but in an SME, I want you to focus on the **S** and the **M**. Be so **specific** that there is no room for debate, and make it so **measurable** that we can track it on a simple whiteboard in the breakroom. Success should be obvious to everyone, not just the person looking at the bank account.

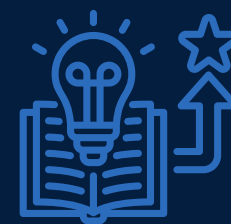
Step 2 - Identify Priorities

The Power of Three Rule

- **Audit the change:** List every improvement idea currently on the table.
- **The Impact vs Effort Filter:**
 - High impact / Low effort: Do these first (quick wins)
 - High impact / High effort: Plan these carefully (strategic bets)
- **The stop doing list:** What project are we pausing to make room for this change?
- **The golden rule:** If you have more than 3 priorities, you have zero priorities.

Priority

We have to be ruthlessly honest about what actually needs to change right now versus what is just a nice to have. I want you to look at your list and ask: If we only fixed one thing this quarter, which one would give us the biggest return? This becomes your priority one. Everything else needs to earn its way onto the list.



Danger of Initiative Overload

Initiative overload is the number 1 killer of SME culture. When staff see a new priority every Monday they will stop taking them seriously. They start waiting it out, assuming this too shall pass. By limiting yourself to 2 or 3 key areas, you signal to the team that these specific things are vital. You give them the permission to focus.

Step 3 - Who is Impacted?

The Stakeholder Mapping Tool

Directly impacted: Who will use the new tool/process every single day?

Indirectly impacted: Who receives the output? (e.g. if sales change, does finance or delivery feel it?)

The change champions: Who are the early adopters who can influence their peers?

The high-risk group: Who loses the most status or control with this change?

Key question: Who haven't we talked to yet?

Change Champions

Identify your change champions early. These aren't always the managers - they are the people the rest of the team goes to for advice. If they buy in, the team follows. Identify who might resist as this is a fear of incompetence. If an employee has used the same paper system for 10 years, a new digital tool makes them feel like a beginner again. You need to account for that emotional shift.



Step 4 - Risks & Barriers

Internal Barriers

- **Skill Gaps:** Do we have the technical know-how?
- **Cultural Inertia:** “That’s not how we do things here”
- **Capacity:** Is the team already at 100%?

External Barriers

- **Timing:** Are we launching during our peak season?
- **Supply Chain:** Are we reliant on outside vendors?

The Skill Gap

Often, resistance isn’t about a bad attitude, its about a lack of confidence. If you are introducing a new digital tool and your most senior employee isn’t tech-savvy their barrier is fear of looking incompetent. If you identify that risk now, you can plan for 1-1 training or learning instead of a generic group presentation.




Honesty Policy

As SME owners, we are naturally optimistic. We have to be to survive. When it comes to change, blind optimism is a risk. Identifying barriers isn’t being negative it is being professionally prepared. It is much easier to fix a problem on a slide today than it is to fix it when your systems are down and your customers are calling.




The SME Roadmap:

- **Key Milestones:** The big rock dates (e.g. go live day, training completion)
- **First Actions:** What are the 3 things we must do in the next 72 hours?
- **Short Timelines:** Work in 2-week “sprints” to keep energy high.
- **Clear Ownership:** One name per task. ‘Everyone’ is not a person.
- **Visual Strategy:** If its not visible, its not happening. Use a whiteboard or a shared digital dashboard.
- **The Golden Rule:** A roadmap should be a sighting tool not a hiding tool.



Avoid 6 month projects, break your change into 2 week sprints. It is much easier to keep a team focused for 14 days than for 14 weeks. At the end of every sprint, celebrate a quick win. These small victories are the fuel that keep the team from getting change fatigue.



Step 5 - Create a Simple Roadmap

Keep it Lean

The Lean Change Philosophy

- **Avoid Complexity:** If the process is harder than the problem it's fixing, simplify it.
- **The Short Horizon Rule:** Plan in detail for the next 14-20 days, keep the next 6 months as a flexible vision.
- **The Pilot Method:** Start small. Test a new process with one person or one day a week.
- **Continuous Feedback:** Don't wait for a formal review. Ask: "What's annoying you about this today?"
- **The Golden Rule:** A 70% perfect plan that is launched beats a 100% perfect plan that is stuck in a drawer.

Action Beats Perfection

Feedback

In a lean strategy, feedback is your fuel. Don't wait for a monthly review. In an SME you can walk across the room and ask "How's the new workflow feeling?" If it is clunky, adjust it. If it is working, double down on it. Your strategy shouldn't be set in stone; it should be a living, breathing guide that adapts to reality.

Imperfection action is always better than perfect hesitation. The market doesn't reward the person with the best plan; it rewards the person who actually implements the change.