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**Research**

# 2007 Change Management

*Survey Report*

A Study by the Society for Human Resource Management



HR: Leading People, Leading Organizations





# 2007 Change Management *Survey Report*

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**SHRM** Research

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# 2007 Change Management

## *Survey Report*

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### About This Report

In November 2006, the Society for Human Resource Management (SHRM) conducted the Change Management Survey, which asked manager-level and above HR professionals in the United States about their experiences with major organizational changes and HR department's role in change management initiatives. HR professionals reported the types of major changes their organizations planned or implemented, the ways that HR had been involved in those changes, how employees received communications and training related to major changes within their organizations and outcomes achieved as a result of HR involvement in change management initiatives. This report presents an analysis of the SHRM Change Management Survey results and examines differences among organizations' change management practices and experiences according to organization staff size and employment sector. There were very few significant differences by organization industry; therefore, those analyses are not included.

### About SHRM

The Society for Human Resource Management (SHRM) is the world's largest association devoted to human resource management. Representing more than 210,000 individual members, the Society's mission is to serve the needs of HR professionals by providing the most essential and comprehensive resources available. As an influential voice, the Society's mission is also to advance the human

resource profession to ensure that HR is recognized as an essential partner in developing and executing organizational strategy. Founded in 1948, SHRM currently has more than 550 affiliated chapters within the United States and members in more than 100 countries. Visit SHRM Online at [www.shrm.org](http://www.shrm.org).

### About SHRM Research

SHRM Research, as part of the Knowledge Development Division supporting SHRM, produces high-quality, leading-edge research and provides expertise on human resource and business issues. It acts as an advisor to SHRM for the purpose of advancing the HR profession and generates and publishes cutting-edge research used by human resource professionals to develop their knowledge and to provide strategic direction to their organizations. As leading experts in the field of HR, SHRM Research works closely with leading academics, policy makers and business leaders.

### About the Author

Amanda Benedict is a survey research specialist for SHRM. Her responsibilities include designing, conducting and analyzing surveys on HR-related topics. She has worked in survey research for the past eight years.

### Acknowledgments

This report is the culmination of a team effort. The SHRM Change Management Survey instrument

was developed by the SHRM Survey Program. The Organizational Development Special Expertise Panel, specifically Maggie Aldrich, SPHR, Fernán R. Cepero, Isaac Dixon, SPHR, John Lewison, SPHR, Nancy Nelson, SPHR, and William D. Young, Ed.D., SPHR, along with an internal committee of SHRM staff, provided valuable insight and recommendations for the survey instrument. The SHRM Survey Program staff facilitated modifications made to the survey instrument and coordinated data collection efforts.

# Introduction

To keep pace in a constantly evolving business world, organizations often find it necessary to implement major enterprise-wide changes affecting their processes, products and people. Going beyond project management and technical tasks undertaken to enact organizational changes, change management leads the “people side” of major change within an organization. The primary goal of change management is to successfully implement new processes, products and business strategies while minimizing negative outcomes.

Organizations can have a clear vision of the changes they want to implement and a technically and structurally sound foundation for making these changes, but the change initiatives can still flounder due to obstacles that arise during implementation. Failing to engage employees and to inform them of the reasons, processes and expected benefits of major organizational changes can lead to lack of acceptance of the changes and, ultimately, failure of these initiatives. This can affect not only the organization and relations within the organization, but also clients and the organization’s reputation.

Change management leaders must promote awareness and understanding of the change initiative to influence employees’ willingness to embrace the change. HR is the obvious candidate for the role of leading the people side of change, but is HR being involved in major organizational changes, and if so, when and how is HR involved? Throughout this report, the responses of HR professionals will be presented to illustrate how change management initiatives are implemented across organizations of various staff sizes and employment sectors. Gaining insight into HR’s role in major organizational changes and positive outcomes related to HR involvement in change management programs and activities will provide insight into HR’s contribution as a strategic partner during transitions within organizations.

# Methodology

**T**he SHRM Change Management Survey was conducted among HR professionals employed by organizations operating in the United States. The survey instrument<sup>1</sup> included questions regarding types of major changes that organizations implemented, practices related to change management and characteristics of the responding organizations.

A sample of HR professionals of manager level and above who were located at companies within the United States was randomly selected from SHRM's membership database, which at the time included approximately 210,000 individual members. Only members who had not participated in an SHRM survey or poll in the previous six months were included in the sampling frame. Members who were students, consultants, academics, located internationally or had no e-mail address on file were excluded from the sampling frame. Beginning in November 2006, an e-mail that included a link to the survey was sent to 3,000 SHRM members. Of these, 2,594 surveys were successfully delivered, and 403 HR professionals responded, yielding a response rate of 16%. The survey was fielded for a period of three weeks, and three e-mail reminders were sent to sample members in an effort to increase the response rate.

The sample of 403 HR professionals of manager level and above was generally representative of the SHRM membership population, although there were some differences by organization staff size, with more HR professionals in this sample from small- and medium-staff-sized organizations and fewer from large-staff-sized organizations. HR professionals in this sample were more likely to report that their HR departments had 1-4 and 25-49 employees and less likely to report that their HR departments had 5-9, 10-24, 50-99 and 100 or more employees. Compared with the general SHRM membership, HR professionals in this sample were more likely to be from the service (profit and nonprofit) and educational service industries and less likely to be from the finance or other industries.

## Notes and Caveats

**Differences:** Conventional statistical methods were used to determine if observed differences were statistically significant (i.e., there is a small likelihood that the differences occurred by chance). Therefore, in most cases, only results that were significant are included, unless otherwise noted.

<sup>1</sup> This survey instrument is available upon request by contacting the SHRM Survey Program at [surveys@shrm.org](mailto:surveys@shrm.org) or by phone at 703-535-6301.

**Generalization of results:** As with any research, readers should exercise caution when generalizing results and take individual circumstances and experiences into consideration when making decisions based on these data. While SHRM is confident in its research, it is prudent to understand that the results presented in this survey report are only truly representative of the sample of HR professionals responding to the survey.

**Number of respondents:** The number of respondents (indicated by “n” in figures and tables) varies from table to table and figure to figure because some respondents did not answer all of the questions. Individuals may not have responded to a question on the survey because the question or some of its parts were not applicable or because the requested data were unavailable. This also accounts for the varying number of responses within each table or figure.

**Confidence level and margin of error:** A confidence level and margin of error give readers some measure

of how much they can rely on survey responses to represent all of SHRM members. Given the level of response to the survey, SHRM is 95% confident that responses given by respondents can be generalized to all SHRM members with a margin of error of approximately 5%. For example, 82% of HR professionals in the sample reported that their organizations had planned or implemented changes requiring change management initiatives in the past 24 months. With a 5% margin of error, the reader can be 95% certain that between 77% and 87% of SHRM members in the United States would report that their organizations planned or implemented change management initiatives related to a major organizational change within the 24 months prior to the survey. It is important to know that as the sample size decreases, the margin of error increases, and therefore the margin of error for each individual question will vary depending on the number of responses to that particular question.

# Key Findings

**M**ore than four out of five HR professionals reported that their organizations *had planned or implemented* major organizational changes requiring change management initiatives during the 24 months prior to the survey. The top three reported major organizational changes that organizations *had planned or implemented* in the 24 months preceding the survey were new and/or revised performance management and review processes, major facilities changes and organizational culture changes. The largest proportions of organizational changes that were considered fully implemented at the time of the survey were acquisitions, initial public offering or corporate ownership changes and facilities changes. Nearly two-thirds of organizations that reported organizational repositioning or realignment indicated that this change was in the process of being implemented at the time of the survey. More than one-third of organizations that reported diversity and/or cross-cultural communication initiatives indicated that they were in the planning stage at the time of the survey.

Almost three-quarters of HR professionals indicated that when HR was involved in processes related to major organizational changes, that involvement began prior to the change being introduced to staff. An additional nearly one-quarter of respondents reported that HR became involved in major organizational changes during the implementation of the change. Fewer than one-quarter of HR professionals indicated that their organizations dedicated HR staff

full time to change management activities during major changes within their organizations.

About two out of five organizations had used change management consultant services during major organizational changes. Nearly two-thirds of HR professionals reported that no particular change management model was followed by their organizations during major changes.

Nearly three-quarters of HR professionals reported that their HR departments' roles during major changes within their organizations included the initial communication to employees about the changes. Only about one out of six respondents reported that HR was responsible for estimating potential return on investment prior to implementing major changes within their organizations, and one out of 10 respondents indicated that HR was responsible for calculating actual return on investment following implementation of major changes.

The top two reported obstacles faced during major organizational changes were employee resistance and communication breakdown. About three-quarters of respondents indicated that these obstacles had occurred during major changes in their organizations. Nearly three-quarters of respondents reported improved employee understanding of the changes taking place within the organization as a positive outcome related to HR involvement in their organizations' change management processes.

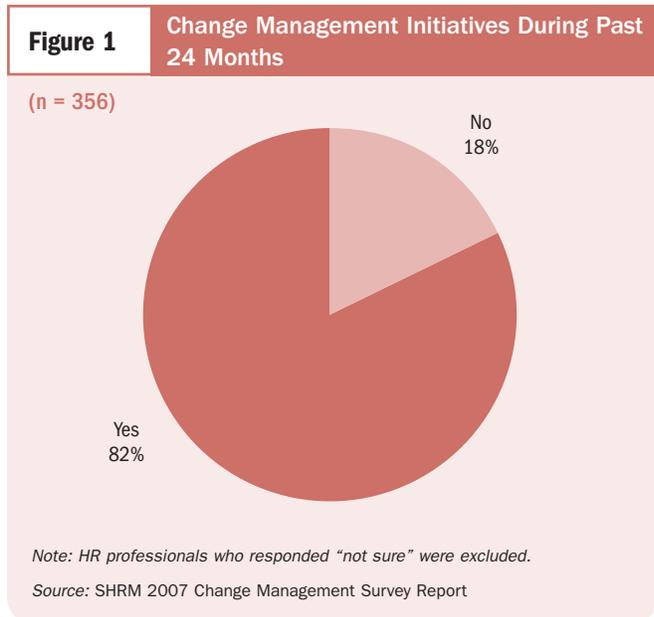
# Survey Results

## Types of Major Organizational Changes

According to HR professionals, more than four out of five organizations (82%) had implemented or planned to implement new processes, products, services and/or policies requiring organization-wide change management initiatives during the 24 months prior to the survey. When responses were analyzed by organization staff size, large-staff-sized organizations (89%) were more likely than small-staff-sized organizations (71%) to report that changes requiring change management initiatives were planned or implemented in the 24 months prior to the survey. These data are depicted in Figure 1 and Table 1.

Organizations implemented or planned to implement a broad range of major organizational changes (Figure 2). The most frequently reported major change planned or implemented by organizations during the 24 months prior to the survey was new and/or revised performance management and review

processes (58%), a change that is typically led by organizations' HR departments and that affects the entire staff. Performance management and review



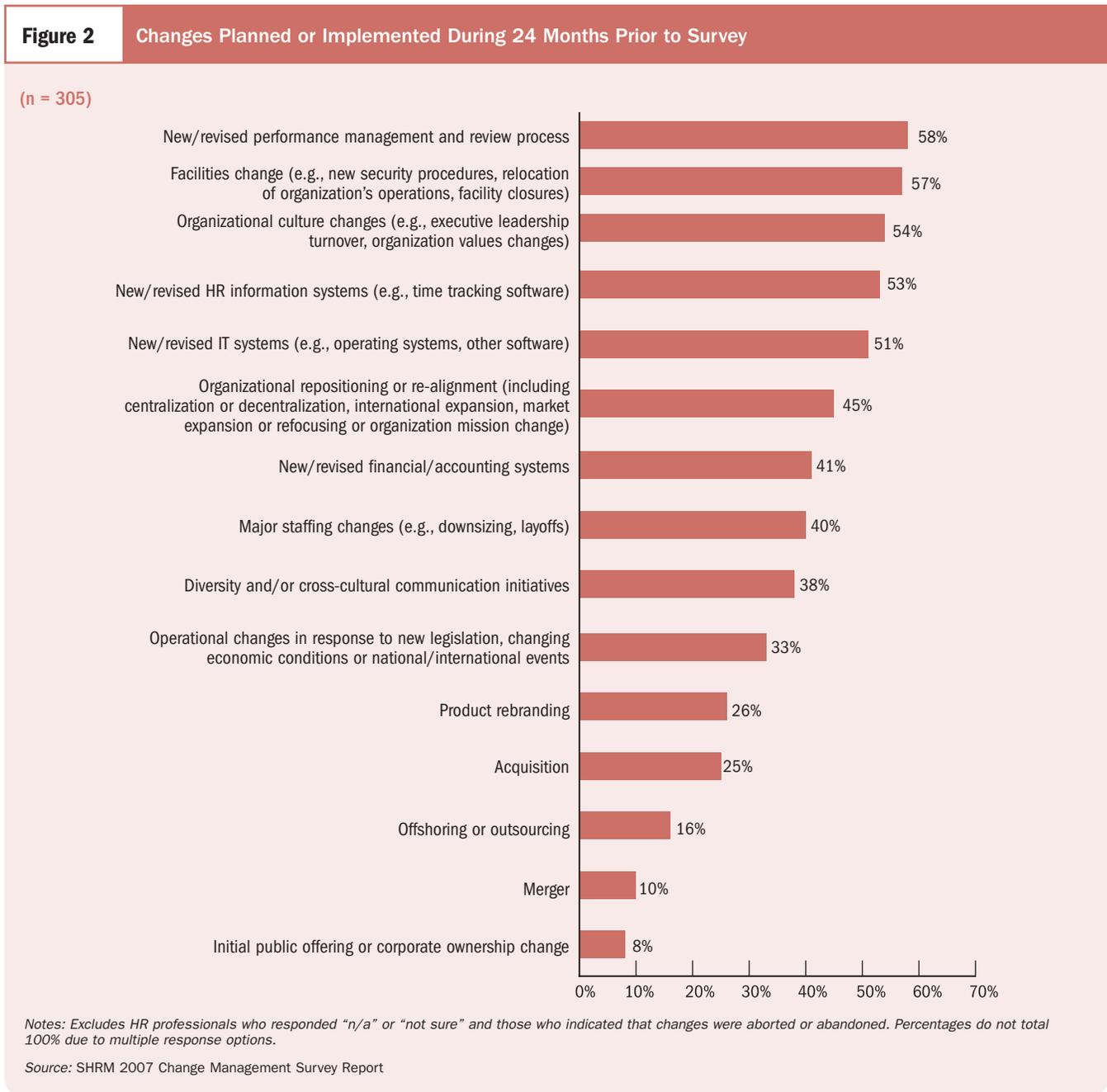
**Table 1** Change Management Initiatives During Past 24 Months (by Organization Staff Size)

	Overall (n = 356)	Small (1-99 Employees) (n = 75)	Medium (100-499 Employees) (n = 110)	Large (500 or More Employees) (n = 98)	Differences Based on Organization Staff Size
Yes	82%	71%	80%	89%	Large > small
No	18%	29%	20%	11%	

Note: HR professionals who responded "not sure" were excluded. The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and responded to this item. Blank cells indicate that no statistically significant differences were found.  
Source: SHRM 2007 Change Management Survey Report

processes are subject to feedback from employees across all levels, and organizations may discover which aspects of performance management systems work well or don't work for their organizations only after trying them out. Organizations may also adjust their performance management processes to retain

key talent through fair practices, provide additional dimensions for employee appraisals and incorporate other changes within the organization (e.g., organizational goals, organizational culture changes). More than one-half of organizations also implemented or planned to implement facilities changes (57%),



organizational culture changes (54%), new and/or revised HR information systems (53%) and new and/or revised IT systems (51%). The smallest percentages of HR professionals reported that their organizations planned or underwent mergers (10%) or initial public offerings or corporate ownership changes (8%) during the 24 months prior to the survey.

Several differences in the percentages of major changes planned or implemented in the 24 months prior to the survey were identified among organizations according to staff size (Table 2). Large-staff-sized organizations were more likely than small-staff-sized organizations to have planned or implemented organizational culture changes (63% compared with 41%), new and/or revised HR information systems (66% compared with 37%) and new and/or revised

<b>Table 2</b>	<b>Major Organizational Changes Planned or Implemented During 24 Months Prior to Survey (by Organization Staff Size)</b>				
	<b>Overall (n = 305)</b>	<b>Small (1-99 Employees) (n = 73)</b>	<b>Medium (100-499 Employees) (n = 88)</b>	<b>Large (500 or More Employees) (n = 90)</b>	<b>Differences Based on Organization Staff Size</b>
New/revised performance management and review process	58%	49%	61%	56%	
Facilities change (e.g., new security procedures, relocation of organization's operations, facility closures)	57%	48%	58%	61%	
Organizational culture changes (e.g., executive leadership turnover, organization values changes)	54%	41%	52%	63%	Large > small
New/revised HR information systems (e.g., time tracking software)	53%	37%	50%	66%	Large > small
New/revised IT systems (e.g., operating systems, other software)	51%	38%	47%	61%	Large > small
Organizational repositioning or realignment (including centralization or decentralization, international expansion, market expansion or refocusing, or organization mission change)	45%	37%	42%	54%	
New/revised financial/accounting systems	41%	34%	40%	39%	
Major staffing changes (e.g., downsizing, layoffs)	40%	33%	38%	47%	
Diversity and/or cross-cultural communication initiatives	38%	21%	33%	54%	Large > small, medium
Operational changes in response to new legislation, changing economic conditions or national/international events	33%	27%	27%	40%	
Product rebranding	26%	25%	23%	27%	
Acquisition	25%	18%	30%	29%	
Offshoring or outsourcing	16%	12%	13%	22%	
Merger	10%	11%	11%	9%	
Initial public offering or corporate ownership change	8%	8%	9%	6%	

*Notes: Data sorted in descending order by "overall" column. Excludes HR professionals who responded "n/a" or "not sure" and those who indicated that changes were aborted or abandoned. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and information about their organizations' major changes.*

Source: SHRM 2007 Change Management Survey Report

**Table 3****Major Organizational Changes Planned or Implemented During 24 Months Prior to Survey  
(by Organization Sector)**

	Overall (n = 305)	Publicly Owned For-Profit Organization (n = 73)	Privately Owned For-Profit Organization (n = 97)	Nonprofit Organization (n = 55)	Government Agency (n = 23)	Differences Based on Organization Sector
New/revised performance management and review process	58%	59%	57%	55%	39%	
Facilities change (e.g., new security procedures, relocation of organization's operations, facility closures)	57%	62%	57%	44%	70%	
Organizational culture changes (e.g., executive leadership turnover, organization values changes)	54%	56%	47%	53%	57%	
New/revised HR information systems (e.g., time tracking software)	53%	63%	51%	35%	65%	Publicly owned for-profit organization > nonprofit organization
New/revised IT systems (e.g., operating systems, other software)	51%	42%	49%	55%	61%	
Organizational repositioning or realignment (including centralization or decentralization, international expansion, market expansion or refocusing, or organization mission change)	45%	59%	41%	29%	52%	Publicly owned for-profit organization > nonprofit organization
New/revised financial/accounting systems	41%	34%	46%	20%	57%	Privately owned for-profit organization > nonprofit organization Government agency > nonprofit organization
Major staffing changes (e.g., downsizing, layoffs)	40%	53%	33%	27%	52%	Publicly owned for-profit organization > privately owned for-profit organization, nonprofit organization
Diversity and/or cross-cultural communication initiatives	38%	56%	26%	31%	52%	Publicly owned for-profit organization > privately owned for-profit organization, nonprofit organization
Operational changes in response to new legislation, changing economic conditions or national/international events	33%	34%	32%	27%	48%	
Product rebranding	26%	27%	26%	22%	13%	
Acquisition	25%	41%	27%	9%	4%	Publicly owned for-profit organization > nonprofit organization, government agency
Offshoring or outsourcing	16%	32%	13%	5%	0%	Publicly owned for-profit organization > privately owned for-profit organization, nonprofit organization
Merger	10%	11%	13%	5%	9%	
Initial public offering or corporate ownership change	8%	5%	14%	2%	0%	Privately owned for-profit organization > nonprofit organization

Notes: Data sorted in descending order by "overall" column. Excludes HR professionals who responded "n/a" or "not sure," those who indicated that changes were aborted or abandoned and those from other organization sectors. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization sector categories are based on the actual number of respondents who provided their organization sector and information about their organizations' major changes.

Source: SHRM 2007 Change Management Survey Report

IT systems (61% compared with 38%). Large organizations (54%) were also more likely than medium (33%) and small organizations (21%) to have planned or implemented diversity and/or cross-cultural communication initiatives in the 24 months prior to the survey. These differences may be partial-

ly explained by workforce management needs that vary according to number of employees.

Among the respondents who reported major organizational changes during the 24 months prior to the survey, the largest percentage of *fully implemented*

**Table 4** Stages of Major Organizational Changes

	Fully Implemented	Implementation in Progress	Planning/Pre-Implementation
Acquisition (n = 75)	52%	32%	16%
Initial public offering or corporate ownership change (n = 23)	52%	39%	9%
Facilities change (e.g., new security procedures, relocation of organization's operations, facility closures) (n = 173)	46%	35%	19%
Major staffing changes (e.g., downsizing, layoffs) (n = 123)	44%	38%	18%
Merger (n = 32)	41%	41%	19%
New/ revised financial/accounting systems (n = 125)	39%	41%	20%
Offshoring or outsourcing (n = 48)	31%	48%	21%
New/ revised performance management and review process (n = 176)	30%	38%	32%
Organizational culture changes (e.g., executive leadership turnover, organization values changes) (n = 165)	29%	55%	15%
Operational changes in response to new legislation, changing economic conditions or national/international events (n = 101)	29%	49%	23%
New/ revised IT systems (e.g., operating systems, other software) (n = 157)	27%	50%	23%
New/ revised HR information systems (e.g., time tracking software) (n = 162)	26%	44%	30%
Product rebranding (n = 78)	22%	54%	24%
Diversity and/or cross-cultural communication initiatives (n = 117)	17%	44%	39%
Organizational repositioning or realignment (including centralization or decentralization, international expansion, market expansion or refocusing, or organization mission change) (n = 137)	15%	64%	21%

Notes: Data sorted in descending order by "fully implemented" column. Excludes HR professionals who responded "n/a" or "not sure" and those who indicated that changes were aborted or abandoned. Row percentages do not total 100% due to rounding.

Source: SHRM 2007 Change Management Survey Report

**Table 5** Average Number of Major Organizational Changes (by Organization Staff Size)

Overall (n = 305)	Small (1-99 Employees) (n = 73)	Medium (100-499 Employees) (n = 88)	Large (500 or More Employees) (n = 90)	Differences Based on Organization Staff Size
4.20	3.65	3.81	5.28	Large > small, medium

Notes: Excludes HR professionals who responded "n/a" or "not sure" and those who indicated that changes were aborted or abandoned. The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and information about their organizations' major changes.

Source: SHRM 2007 Change Management Survey Report

changes was reported for acquisitions (52%) and initial public offerings or corporate ownership changes (52%). The largest percentages of changes for which implementation was *in progress* were reported for organizational repositioning or realignment (64%), organizational culture changes (55%) and product rebranding (54%). The largest percentage of major organizational changes in the *planning/pre-implementation* stage was reported for diversity and/or cross-cultural communication initiatives (39%). These data are shown in Table 4.

As shown in Table 5, compared with small- and medium-staff-sized organizations, large-staff-sized organizations reported greater average numbers of major organizational changes in the 24 months prior to the survey. This finding is not unexpected, given that large organizations may be more sensitive to internal and external pressures necessitating major organizational changes and are more likely to have the resources to manage multiple major organizational changes at the same time.

According to respondents, publicly owned for-profit organizations planned or implemented a greater average number of major organizational changes in the 24 months prior to the survey than did privately owned for-profit organizations and nonprofit organizations (Table 6). As with differences among organizations due to staff size, across organization sectors, there are varying degrees of need to undertake

selected major organizational changes. This finding may indicate that publicly owned for-profit organizations have greater accountability for keeping pace with changes in the market and may respond by implementing enterprise-wide changes.

### Leadership and Design of Change Management Initiatives

According to respondents, HR departments at about one-tenth of organizations (11%) were not involved in processes related to major organizational changes. When HR departments were involved in the processes related to major organizational changes, nearly three-quarters (73%) became involved prior to the change being introduced to all employees (Figure 3). About one-quarter of HR departments (22%) reported becoming involved in major organizational changes during the implementation process. Only 5% of respondents indicated that their organizations' HR departments weren't involved in major organizational changes until after these changes went into effect. There were no significant differences in HR involvement in change management processes based on organization staff size or organization sector. The finding that HR departments were most likely to be involved with the planning for major changes indicates that more often than not HR is viewed as a strategic partner for the change process. HR departments and functions are best able to support their organizations' business goals in major organizational changes when they are involved early in develop-

**Table 6** Average Number of Major Organizational Changes (by Organization Sector)

Overall (n = 305)	Publicly Owned For-Profit Organization (n = 73)	Privately Owned For-Profit Organization (n = 97)	Nonprofit Organization (n = 55)	Government Agency (n = 23)	Differences Based on Organization Sector
4.20	5.46	4.04	3.24	4.29	Publicly owned for-profit organization > privately owned for-profit organization, nonprofit organization

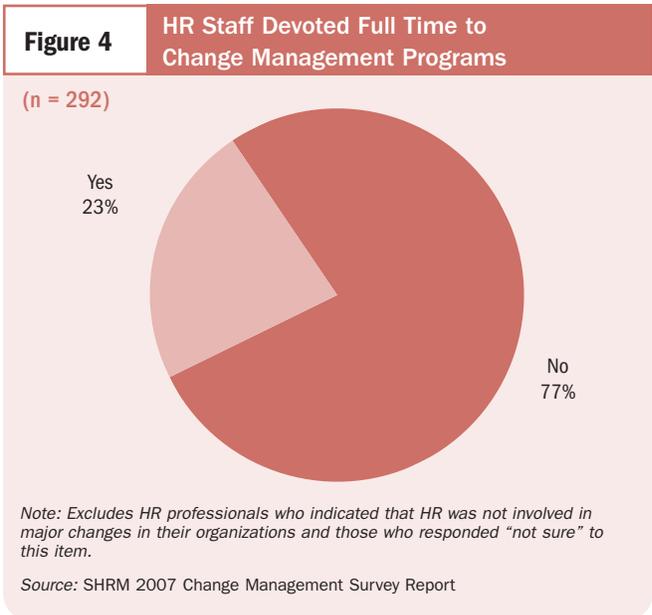
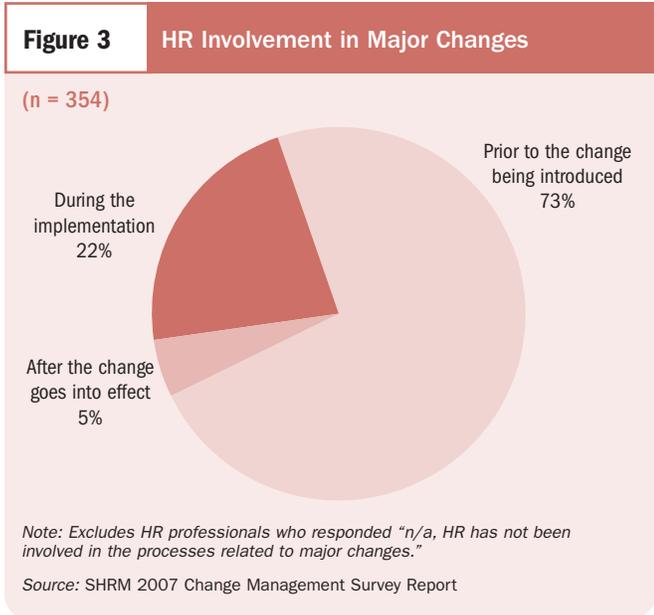
Notes: Excludes HR professionals who responded "n/a" or "not sure" and those who indicated that changes that were aborted or abandoned. The sample sizes and percentages shown in the organization sector categories are based on the actual number of respondents who provided their organization sector and information about their organizations' major changes.

Source: SHRM 2007 Change Management Survey Report

ing strategies for engaging employees and mitigating other human capital issues that may adversely impact the success of change initiatives.

Few organizations had HR staff whose sole full-time responsibility was managing change-related initiatives (Figure 4). Fewer than one-quarter of HR professionals (23%) reported that their organizations devoted any HR staff full time to change management programs during major organizational changes. When HR professionals are involved with change management activities, they typically balance those tasks with other responsibilities.

Not surprisingly, large organizations (29%) were more likely than small organizations (12%) to have HR staff devoted full time to change management programs during major organizational changes (Table 7). As previously reported, large organizations reported a greater average number of major organizational changes, which may necessitate more HR department time devoted to managing change-related initiatives. Large organizations may also have more flexibility to temporarily divide and reassign regular HR functions amongst the HR department staff in order to devote one or more HR department employees solely to managing change-related programs. Large organizations also may have more resources to hire



**Table 7** HR Staff Devoted Full Time to Change Management Programs (by Organization Staff Size)

	Overall (n = 292)	Small (1-99 Employees) (n = 68)	Medium (100-499 Employees) (n = 105)	Large (500 or More Employees) (n = 90)	Differences Based on Organization Staff Size
Yes	23%	12%	19%	29%	Large > small
No	77%	88%	81%	71%	

Note: Excludes HR professionals who indicated that HR was not involved in major changes in their organizations and those who responded "not sure" to this item. The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and information about their HR staffing during major organizational changes. Blank cells indicate that no statistically significant differences were found.  
Source: SHRM 2007 Change Management Survey Report

and support a permanent position with the primary responsibility of change management for the organization, particularly within organizations that undergo concurrent multiple major changes.

Publicly owned for-profit organizations (33%) were more likely than nonprofit organizations (12%) to have HR staff devoted full time to change management programs (Table 8). This may be related to the earlier finding that publicly owned for-profit organizations planned or implemented a greater average number of major organizational changes than did nonprofit organizations, indicating that organizations with multiple major organizational changes may find it necessary or useful to dedicate HR staff time to managing programs related to the change. This is further supported by the finding that organizations that have HR staff devoted full time to change management programs have a greater average number

of major organizational changes than organizations that do not have HR staff devoted full time to change management programs (Table 9). This dedication of HR staff time may help build HR competency in managing change-related processes and benefit the organization by providing employees with a point of contact for change-related issues during the organization's transition.

When HR is involved in processes related to major organizational changes, it performs a variety of functions associated with the communication, implementation and tracking of such changes. The largest percentage of HR professionals—more than four out of five—reported that their HR departments assisted employees in the transitions through processes of major organizational changes (88%), such as by serving as a point of contact for questions and concerns that arose during the planning or

**Table 8** HR Staff Devoted Full Time to Change Management Programs (by Organization Sector)

	Overall (n = 292)	Publicly Owned For-Profit Organization (n = 69)	Privately Owned For-Profit Organization (n = 102)	Nonprofit Organization (n = 59)	Government Agency (n = 28)	Differences Based on Organization Sector
Yes	23%	33%	18%	12%	21%	Publicly owned for-profit organization > nonprofit organization
No	77%	67%	82%	88%	79%	

Note: Excludes HR professionals who indicated that HR was not involved in major changes in their organizations, those who responded "not sure" to this item and those from other organization sectors. The sample sizes and percentages shown in the organization sector categories are based on the actual number of respondents who provided their organization sector and information about their HR staffing during major organizational changes. Blank cells indicate that no statistically significant differences were found.

Source: SHRM 2007 Change Management Survey Report

**Table 9** Average Number of Major Organizational Changes (by HR Staffing)

	Overall (n = 305)	HR Staff Devoted Full Time (n = 67)	No HR Staff Devoted Full Time (n = 225)	Differences by HR Staffing
	4.20	5.27	4.10	HR staff devoted full time > no HR staff devoted full time

Notes: Excludes HR professionals who responded "n/a" or "not sure" regarding major organizational changes, those who indicated that changes that were aborted or abandoned, those who indicated that HR was not involved in major changes in their organizations and those who responded "not sure" to this item. The sample sizes and percentages shown in the HR staffing categories are based on the actual number of respondents who provided information about major organizational changes and information about their HR staffing during major organizational changes.

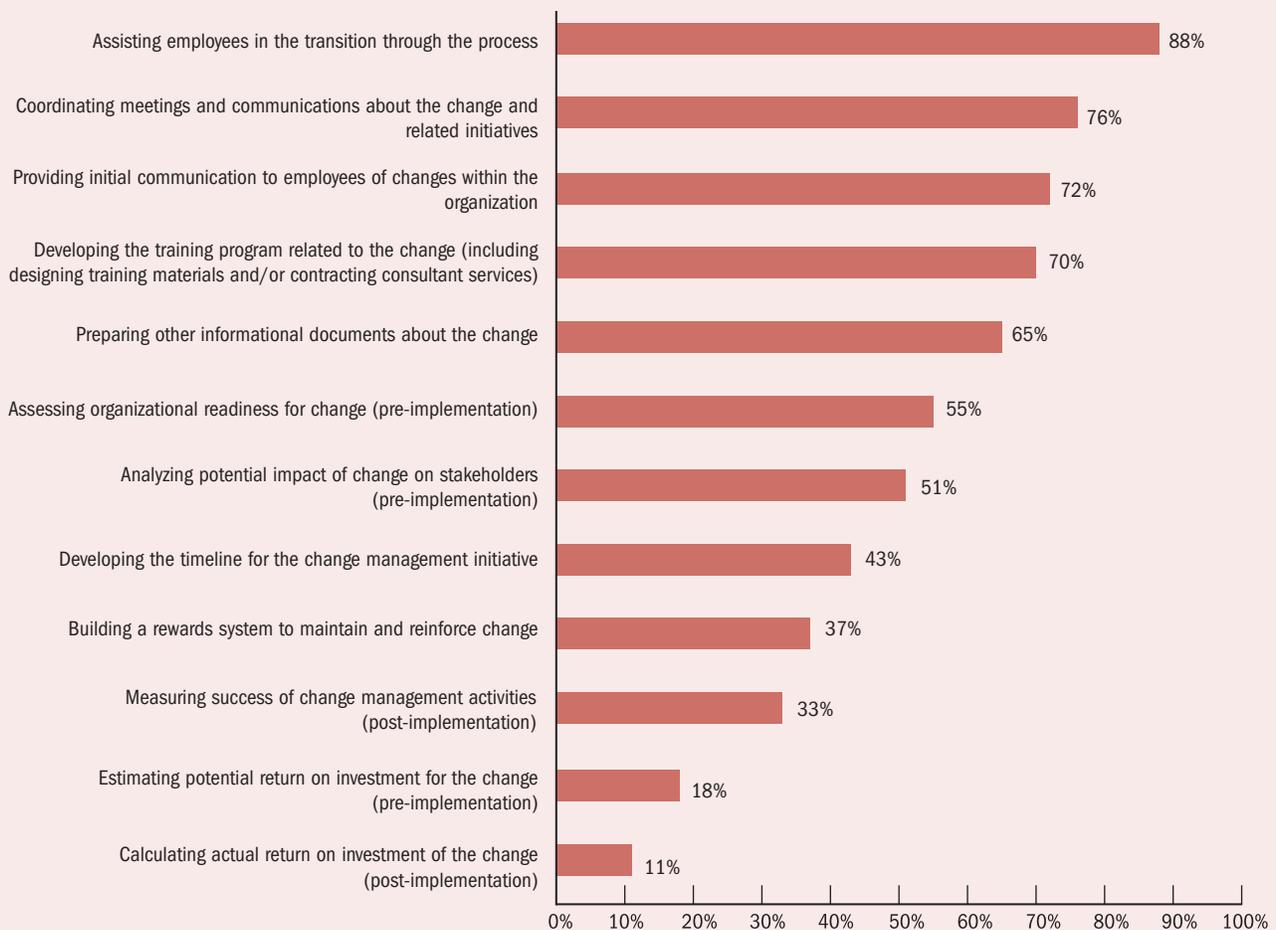
Source: SHRM 2007 Change Management Survey Report

implementation of the change initiatives and explaining any impact on staffing that might result from the changes. The second largest percentage of HR professionals reported that their HR departments coordinated meetings and communications about the change and related initiatives (76%). The smallest percentage of HR professionals reported that their HR departments were responsible for calculating the post-implementation return on investment for major organizational changes (11%). These data

are shown in Figure 5. Overall, HR departments were least likely to be responsible for tasks that involved calculations of return on investment or measuring the success of change initiatives. While organizations might consider return-on-investment calculations to fit best within their finance departments, HR has considerable expertise in human capital issues and could benefit their organizations by producing metrics for these areas related to the major organizational changes.

**Figure 5** HR Roles During Major Organizational Changes

(n = 316)



Note: Excludes HR professionals who indicated that their HR departments were not involved in processes related to major changes in their organizations. Percentages do not total 100% due to multiple response options.

Source: SHRM 2007 Change Management Survey Report

As shown in Table 10, large organizations (61%) were more likely than medium organizations (43%) to have reported that their HR departments analyzed the potential impact of major organizational changes prior to the implementation of the changes. This was the only role for which significant differences were identified based on organization staff size.

One difference was identified among organization sectors in the percentages of respondents whose HR departments had responsibility for various tasks during major organizational changes. Respondents

employed by government agencies (3%) were less likely than those employed by nonprofit organizations (38%), publicly owned for-profit organizations (35%) and privately owned for-profit organizations (34%) to report that the HR departments measured the success of change management activities in promoting employee adoption of major changes within their organizations (Table 11). This finding indicates that across organization sectors, HR departments provide similar functions during major organizational changes.

**Table 10** HR Roles During Major Organizational Changes (by Organization Staff Size)

	Overall (n = 316)	Small (1-99 Employees) (n = 72)	Medium (100-499 Employees) (n = 113)	Large (500 or More Employees) (n = 98)	Differences Based on Organization Staff Size
Assisting employees in the transition through the process	88%	85%	88%	93%	
Coordinating meetings and communications about the change and related initiatives	76%	81%	78%	74%	
Initial communication to employees about changes within the organization	72%	73%	76%	67%	
Developing the training program related to the change (including designing training materials and/or contracting consultant services)	70%	67%	72%	71%	
Preparing other informational documents about the change	65%	66%	60%	66%	
Assessing organizational readiness for change (pre-implementation)	55%	47%	58%	58%	
Analyzing potential impact of change on stakeholders (pre-implementation)	51%	45%	43%	61%	Large > medium
Developing the timeline for the change management initiative	43%	47%	35%	50%	
Building a rewards system to maintain and reinforce change	37%	32%	35%	44%	
Measuring success of change management activities in promoting employee awareness and acceptance of changes within organization (post-implementation)	33%	32%	34%	33%	
Estimating potential return on investment for the change (pre-implementation)	18%	16%	16%	20%	
Calculating actual return on investment of the change (post-implementation)	11%	10%	11%	11%	

Note: Data sorted in descending order by "overall" column. Excludes HR professionals who indicated that their HR departments were not involved in processes related to major changes in their organizations. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and information about HR's role during major organizational changes.

Source: SHRM 2007 Change Management Survey Report

Slightly fewer than one-half of HR professionals (41%) reported that their organizations had used a change management consultant during major organizational changes (Figure 6).

Use of external change management consultants varied among organizations of different staff sizes (Table 12). Large organizations (57%) were more likely than medi-

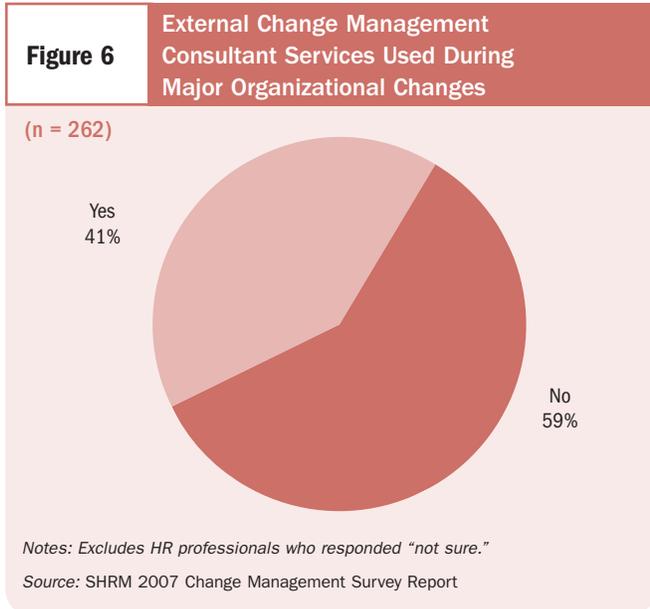
um (35%) and small organizations (26%) to have used a change management consultant during major organizational changes. These differences may be related to availability of financial resources to hire a consultant as well as the perceived need for change management consultant services. Change management consultants might be seen as more necessary in large organizations where there are greater complexities in organiza-

**Table 11** HR Roles During Major Organizational Changes (by Organization Sector)

	Overall (n = 316)	Publicly Owned For-Profit Organization (n = 79)	Privately Owned For-Profit Organization (n = 110)	Nonprofit Organization (n = 60)	Government Agency (n = 29)	Differences Based on Organization Sector
Assisting employees in the transition through the process	88%	91%	89%	83%	90%	
Coordinating meetings and communications about the change and related initiatives	76%	76%	77%	85%	62%	
Initial communication to employees about changes within the organization	72%	78%	75%	67%	55%	
Developing the training program related to the change (including designing training materials and/or contracting consultant services)	70%	66%	72%	75%	66%	
Preparing other informational documents about the change	65%	62%	65%	65%	62%	
Assessing organizational readiness for change (pre-implementation)	55%	48%	57%	57%	48%	
Analyzing potential impact of change on stakeholders (pre-implementation)	51%	43%	49%	53%	59%	
Developing the timeline for the change management initiative	43%	38%	41%	53%	34%	
Building a rewards system to maintain and reinforce change	37%	41%	40%	38%	17%	
Measuring success of change management activities in promoting employee awareness and acceptance of changes within organization (post-implementation)	33%	35%	34%	38%	3%	Publicly owned for-profit organization > government agency Privately owned for-profit organization > government agency Nonprofit organization > government agency
Estimating potential return on investment for the change (pre-implementation)	18%	14%	21%	18%	14%	
Calculating actual return on investment of the change (post-implementation)	11%	9%	13%	12%	0%	

*Note: Data sorted in descending order by "overall" column. Excludes HR professionals who indicated that their HR departments were not involved in processes related to major changes in their organizations. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization sector categories are based on the actual number of respondents who provided their organization sector and information about HR's role during major organizational changes.*

Source: SHRM 2007 Change Management Survey Report



tional structures that present potential change-related communication and training challenges.

Some differences emerged among organization sectors in the use of external change management consultants (Table 13). Government agencies (58%) and publicly owned for-profit organizations (55%) were more likely than privately owned for-profit organizations (26%) to have used a change management consultant during major organizational changes. Among the organizational characteristics that may have contributed to these differences is transparency of operations: publicly owned for-profit organizations and government agencies may be more subject to external accountability and standards of practice and thus may feel more pressure to employ expert professional services to guide their organizations through major changes.

**Table 12** External Change Management Consultant Services Used During Major Organizational Changes (by Organization Staff Size)

	Overall (n = 262)	Small (1-99 Employees) (n = 70)	Medium (100-499 Employees) (n = 100)	Large (500 or More Employees) (n = 82)	Differences Based on Organization Staff Size
Yes	41%	26%	35%	57%	Large > small, medium
No	59%	74%	65%	43%	

Notes: Excludes HR professionals who responded "not sure." The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and information about the use of external change management consultants. Blank cells indicate that no statistically significant differences were found.  
Source: SHRM 2007 Change Management Survey Report

**Table 13** External Change Management Consultants Services Used During Major Organizational Changes (by Organization Sector)

	Overall (n = 262)	Publicly Owned For-Profit Organization (n = 56)	Privately Owned For-Profit Organization (n = 100)	Nonprofit Organization (n = 61)	Government Agency (n = 25)	Differences Based on Organization Sector
Yes	41%	55%	26%	45%	58%	Publicly owned for-profit organization > privately owned for-profit organization Government agency > privately owned for-profit organization
No	59%	45%	74%	55%	42%	

Notes: Excludes HR professionals who responded "not sure." The sample sizes and percentages shown in the organization sector categories are based on the actual number of respondents who provided their organization sector and information about the use of external change management consultants. Blank cells indicate that no statistically significant differences were found.  
Source: SHRM 2007 Change Management Survey Report

**Table 14** Average Number of Major Organizational Changes (by Use of Change Management Consultant)

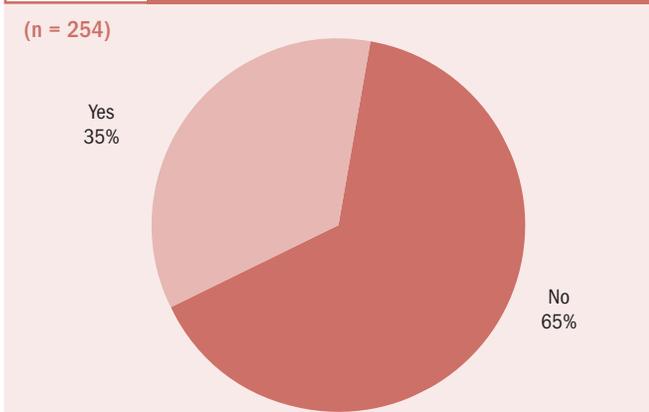
Overall (n = 305)	Used Change Management Consultant (n = 108)	Did Not Use Change Management Consultant (n = 154)	Differences by Use of Change Management Consultant
4.20	5.31	3.61	Used change management consultant > did not use change management consultant

Notes: Excludes HR professionals who responded "n/a" or "not sure" regarding major organizational changes, those who indicated that changes were aborted or abandoned and those who responded "not sure" to this item. The sample sizes and percentages shown in the use of change management consultant categories are based on the actual number of respondents who indicated whether their organizations used external change management consultants and provided information about their organizations' major changes.

Source: SHRM 2007 Change Management Survey Report

HR professionals from organizations that used change management consultants during major organizational changes reported significantly greater average numbers of major changes during the 24 months prior to the survey compared with organizations that did not use change management consultants (Table 14). The organizations that used change management consultants may have chosen to do so due to such factors as the anticipated impact of the major changes being implemented, concurrent implementation of multiple changes, availability of HR department time to devote to change management initiatives and public relations issues.

**Figure 7** Change Management Model Used During Major Organizational Changes



Notes: Excludes HR professionals who responded "not sure."

Source: SHRM 2007 Change Management Survey Report

Organizations tended to develop their change management initiatives according to the perceived needs of their organizations rather than strictly based on theories of change management incorporated in change management models. About two-thirds of HR professionals (65%) reported that their organizations did not follow any particular change management model during major organizational changes (Figure 7).

According to respondents, more than one-half of large-staff-sized organizations (55%) followed a particular change management model during major organizational changes. This proportion decreased precipitously for organizations with fewer than 500 employees. Large organizations were more likely than medium (26%) and small organizations (19%) to have followed any particular change management model (Table 15).

**Table 15** Change Management Model Used During Major Organizational Changes (by Organization Staff Size)

	Overall (n = 254)	Small (1-99 Employees) (n = 67)	Medium (100-499 Employees) (n = 96)	Large (500 or More Employees) (n = 84)	Differences Based on Organization Staff Size
Yes	35%	19%	26%	55%	Large > small, medium
No	65%	81%	74%	45%	

Notes: Excludes HR professionals who responded "not sure." The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and information about the use of change management models. Blank cells indicate that no statistically significant differences were found.

Source: SHRM 2007 Change Management Survey Report

Among organization sectors, publicly owned for-profit organizations (57%) were more likely than privately owned for-profit organizations (29%) and nonprofit organizations (23%) to report using a particular change management model during their major organizational changes. These data are shown in Table 16.

According to HR respondents, the larger the number of major changes an organization experienced, the greater the likelihood that the organization used a change management model (Table 17). Organizations that indicated having followed a particular change management model during major organizational changes reported a greater average number of major changes compared with organizations that did not follow any particular change management model during their major organizational changes. For organizations with multiple major changes occurring in a relatively short period of time, following a model of change management may provide direction for consistency of prac-

tices for the change management leaders and, in turn, provide a familiar sequence to implementation for the employees who are affected by the changes.

### Impact of Major Organizational Changes

Within organizations experiencing major changes, a larger percentage of executive, managerial and non-managerial staff was affected by change management initiatives compared with CEO/president and/or owner or the board of directors. More than three-quarters of HR professionals reported that change management initiatives at their organizations affected the executive team or senior management (81%), nonexecutive-level managers and supervisors (80%) and nonmanagerial-level employees (77%). Fewer than one-quarter of HR professionals (22%) reported that their organizations' boards of directors had been affected by change management initiatives related to major organizational changes. This finding is not surprising, given that boards are not typically involved in the behind-the-

**Table 16** Change Management Model Used During Major Organizational Changes (by Organization Sector)

	Overall (n = 254)	Publicly Owned For-Profit Organization (n = 58)	Privately Owned For-Profit Organization (n = 99)	Nonprofit Organization (n = 60)	Government Agency (n = 26)	Differences Based on Organization Sector
Yes	35%	57%	29%	23%	27%	Publicly owned for-profit organization > privately owned for-profit organization, nonprofit organization
No	65%	43%	71%	77%	73%	

Notes: Excludes HR professionals who responded "not sure." The sample sizes and percentages shown in the organization sector categories are based on the actual number of respondents who provided their organization sector and information about the use of change management models. Blank cells indicate that no statistically significant differences were found.

Source: SHRM 2007 Change Management Survey Report

**Table 17** Average Number of Major Organizational Changes (by Use of Change Management Model)

	Overall (n = 305)	Used Change Management Model (n = 88)	Did Not Use Change Management Model (n = 166)	Differences by Use of Change Management Model
	4.20	5.44	3.89	Used change management model > did not use change management model

Notes: Excludes HR professionals who responded "n/a" or "not sure" and those who indicated that changes that were aborted or abandoned. The sample sizes and percentages shown in the use of change management model categories are based on the actual number of respondents who provided information about their organizations' use of change management models and information about their major organizational changes.

Source: SHRM 2007 Change Management Survey Report

scenes aspects of organizations’ business operations that include major organizational changes such as new/revised performance management and reviews, HR information systems and IT systems. These data are shown in Figure 8.

One difference was identified among organizations of different staff sizes in the proportion of stakeholders within organizations who were affected by change management initiatives. According to HR professionals, nonexecutive managers and supervisors were more likely to be affected by change management initiatives in large organizations (87%) than in small organizations (73%), possibly because this staff category is more likely to be found in larger organizations. These data are shown in Table 18.

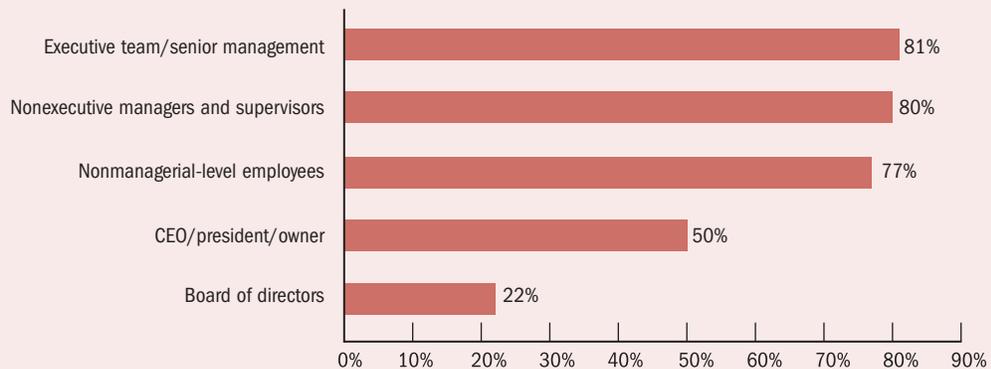
Analyzed by organization sector, the data revealed two types of stakeholders that were differently affected by change management initiatives (Table 19). Privately owned for-profit organizations (56%) were more likely than government agencies (27%) to report that their CEO, president and/or owner was affected by change management initiatives. Nonprofit organizations (35%) were more likely than publicly owned for-profit organizations (14%) to report that

their board of directors was affected by their organizations’ change management initiatives. These differences may be attributable in part to differences in hierarchical structures within the various organization sectors.

How do employees receive communications related to major impending and in-progress organizational changes? As shown in Figure 9, about two-thirds of HR professionals reported that information related to major changes within their organizations was communicated through department meetings (67%), e-mails, voicemails and/or letters to employees from the organizations’ executive management (67%) and all-employee meetings (63%). Nearly one-half of respondents (46%) reported that employees received change-related communications via e-mail, voicemail or letter from their organizations’ HR departments, a finding that indicates that HR is viewed as a leader during major organizational changes. Only about one out of five organizations used e-mails, voicemails and/or letters to employees from departments other than HR or executive management (19%) and video and/or phone conference broadcasts (19%) to communicate information about major organizational changes to employees.

**Figure 8** Stakeholders Affected by Change Management Initiatives

(n = 329)



Note: Data sorted in descending order. Percentages do not total 100% due to multiple response options.

Source: SHRM 2007 Change Management Survey Report

It stands to reason that methods for communicating information and announcements related to major changes would vary according to the size of the organization. Numerous differences were identified among organizations of various staff sizes in the proportions of companies that used various methods of communicating major organizational changes to employees. Large-staff-sized organizations (81%) were more likely than medium- (64%) or small-staff-sized organizations (51%) to report that their employees received e-mails, voicemails or letters related

to major organizational changes from their organizations' executive management. Large staff-sized organizations were also more likely to communicate information related to the changes via the company Web site or intranet (66%), press releases (36%) and e-mails, voicemails or letters to employees from departments other than HR (26%). Medium organizations (45%) were more likely than small organizations (29%) to communicate changes to employees via materials posted in break rooms, on bulletin boards

**Table 18** Stakeholders Affected by Change Management Initiatives (by Organization Staff Size)

	Overall (n = 329)	Small (1-99 Employees) (n = 68)	Medium (100-499 Employees) (n = 105)	Large (500 or More Employees) (n = 90)	Differences Based on Organization Staff Size
Executive team/senior management	81%	83%	76%	83%	
Nonexecutive managers and supervisors	80%	73%	77%	87%	Large > small
Nonmanagerial-level employees	77%	76%	73%	79%	
CEO/president/owner	50%	55%	48%	46%	
Board of directors	22%	17%	22%	24%	

*Note: Data sorted in descending order by "overall" column. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and information about stakeholders affected during major organizational changes.*

Source: SHRM 2007 Change Management Survey Report

**Table 19** Stakeholders Affected by Change Management Initiatives (by Organization Sector)

	Overall (n = 329)	Publicly Owned For-Profit Organization (n = 84)	Privately Owned For-Profit Organization (n = 124)	Nonprofit Organization (n = 69)	Government Agency (n = 30)	Differences Based on Organization Sector
Executive team/senior management	81%	79%	81%	80%	83%	
Nonexecutive managers and supervisors	80%	82%	77%	78%	80%	
Nonmanagerial-level employees	77%	77%	74%	75%	80%	
CEO/president/owner	50%	46%	56%	49%	27%	Privately owned for-profit organization > government agency
Board of directors	22%	14%	19%	35%	17%	Nonprofit organization > publicly owned for-profit organization

*Note: Data sorted in descending order by "overall" column. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization sector categories are based on the actual number of respondents who provided their organization sector and information about stakeholders affected during major organizational changes.*

Source: SHRM 2007 Change Management Survey Report

or elsewhere on organization premises. These data are illustrated in Table 20.

Several differences were identified among organization sectors in the percentage of organizations that used various methods to communicate change-related information to employees, with publicly owned for-profit organizations more likely than organizations in several other sectors to use the company Web site or intranet, press releases and video and/or phone broadcasts to communicate information about major organizational changes to employees (Table 21). Government agencies were more likely than nonprofit organizations to use e-mail, voicemail or letters from executive management to employees (84% compared with 57%) and were more likely than privately owned for-profit organizations to post change-related

information on their organizations' Web sites or intranet (55% compared with 29%). Privately owned for-profit organizations (73%) were more likely than publicly owned for-profit organizations (54%) to use all-employee meetings for communicating changes within their organizations.

More than one-quarter of HR professionals (26%) reported that training related to major organizational changes was not mandatory at any staff level within their organizations. Among the HR professionals who reported that their organizations had mandatory training related to major changes within their organizations, the employee level for which the largest percentage of organizations had mandatory training was nonexecutive managers and supervisors (92%). Only 65% of HR professionals reported that training

**Figure 9** Change-Related Communications

(n = 334)



Note: Excludes HR professionals who indicated that their organizations had not communicated major changes to employees. Percentages do not total 100% due to multiple response options.

Source: SHRM 2007 Change Management Survey Report

related to major changes was mandatory for their organizations' CEO/president and/or owner. These data are depicted in Figure 10.

One out of 10 organizations (10%) did not provide training related to major organizational changes to their employees. This may be partly explained by the types of changes being planned or implemented: in some cases, communication about the changes may suffice. Among organizations that trained employees about major organizational changes, the largest percentage of HR professionals (79%) reported that their organizations trained employees through group or one-on-one sessions led by instructors. More than one-half of organizations (51%) distributed hardcopy training materials. Smaller percentages of organizations indicated that their employees received online or software-based training. These data are illustrated in Figure 11.

Among organizations that trained employees about major organizational changes, large-staff-sized organizations (57%) were more likely than small- (36%) and medium-staff-sized organizations (32%) to report that their organizations provided training through online (i.e., downloadable) training manuals, job aides or other documentation. Large organizations (44%) were more likely than medium (26%) and small organizations (8%) and medium organizations were more likely than small organizations to provide training through e-learning modules on their organizations' Web sites. Large organizations (26%) were also more likely than small (11%) and medium organizations (11%) to report providing training through software-based tutorials. Large organizations may be more likely to offer Web-based or software-based training as a convenient means to reinforce other training methods or to allow large numbers of employees to train at the convenience of their

**Table 20** Methods of Communicating Major Organizational Changes to Employees (by Organization Staff Size)

	Overall (n = 334)	Small (1-99 Employees) (n = 87)	Medium (100-499 Employees) (n = 121)	Large (500 or More Employees) (n = 107)	Differences Based on Organization Staff Size
Department meetings	67%	59%	67%	74%	
E-mail, voicemail or letter to employees from organization's executive management	67%	51%	64%	81%	Large > small, medium
All-employee meeting	63%	70%	64%	57%	
Training sessions	49%	44%	48%	52%	
Information posted on company Web site or intranet	46%	18%	45%	66%	Medium > small Large > small, medium
E-mail, voicemail or letter to employees from HR	46%	43%	43%	48%	
Materials posted in break rooms, on bulletin boards or elsewhere on organization premises	39%	29%	45%	37%	Medium > small
Press release or other media communication	24%	10%	22%	36%	Large > small
E-mail, voicemail or letter to employees from department other than HR	19%	14%	12%	26%	Large > medium
Video/phone conference broadcast	19%	14%	20%	21%	

*Note: Data sorted in descending order by "overall" column. Excludes HR professionals who indicated that their organizations had not communicated major changes to employees. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and information about methods of communicating major organizational changes.*

Source: SHRM 2007 Change Management Survey Report

schedule and learning pace. These data are shown in Table 22.

As shown in Table 23, publicly owned for-profit organizations were more than twice as likely as privately owned for-profit organizations to conduct employee training related to major organizational changes through e-learning modules on company Web sites (43% compared with 21%) and software-based tutorials (26% compared with 10%). Overall, these training methods were used least frequently across all organization sectors. Although the differences were not

significant, smaller percentages of publicly owned for-profit organizations, compared with other sectors, trained employees by providing group or individual instructor-led sessions and hardcopy training manuals, job aides or other documentation. Similarly, larger percentages of publicly owned for-profit organizations provided training through online downloadable manuals, job aides or other documentation. These findings suggest that, compared with other organization sectors, publicly owned for-profit organizations are more likely to employ electronic methods of training employees.

<b>Table 21</b> Methods of Communicating Organizational Changes to Employees (by Organization Sector)						
	Overall (n = 334)	Publicly Owned For-Profit Organization (n = 84)	Privately Owned For-Profit Organization (n = 127)	Nonprofit Organization (n = 69)	Government Agency (n = 31)	Differences Based on Organization Sector
Department meetings	67%	69%	63%	74%	65%	
E-mail, voicemail or letter to employees from organization's executive management	67%	75%	61%	57%	84%	Government agency > nonprofit organization
All-employee meeting	63%	54%	73%	55%	68%	Privately owned for-profit organization > publicly owned for-profit organization
Training sessions	49%	44%	53%	46%	48%	
Information posted on company web site or intranet	46%	64%	29%	46%	55%	Publicly owned for-profit organization > privately owned for-profit organization Government agency > privately owned for-profit organization
E-mail, voicemail or letter to employees from HR	46%	45%	51%	46%	35%	
Materials posted in break rooms, on bulletin boards or elsewhere on organization premises	39%	46%	39%	28%	35%	
Press release or other media communication	24%	35%	17%	16%	39%	Publicly owned for-profit organization > privately owned for-profit organization
E-mail, voicemail or letter to employees from department other than HR	19%	20%	18%	16%	19%	
Video/phone conference broadcast	19%	36%	18%	9%	6%	Publicly owned for-profit organization > privately owned for-profit organization, nonprofit organization, government agency

*Note: Data sorted in descending order by "overall" column. Excludes HR professionals who indicated that their organizations had not communicated major changes to employees. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization sector categories are based on the actual number of respondents who provided their organization sector and information about methods of communicating major organizational changes.*

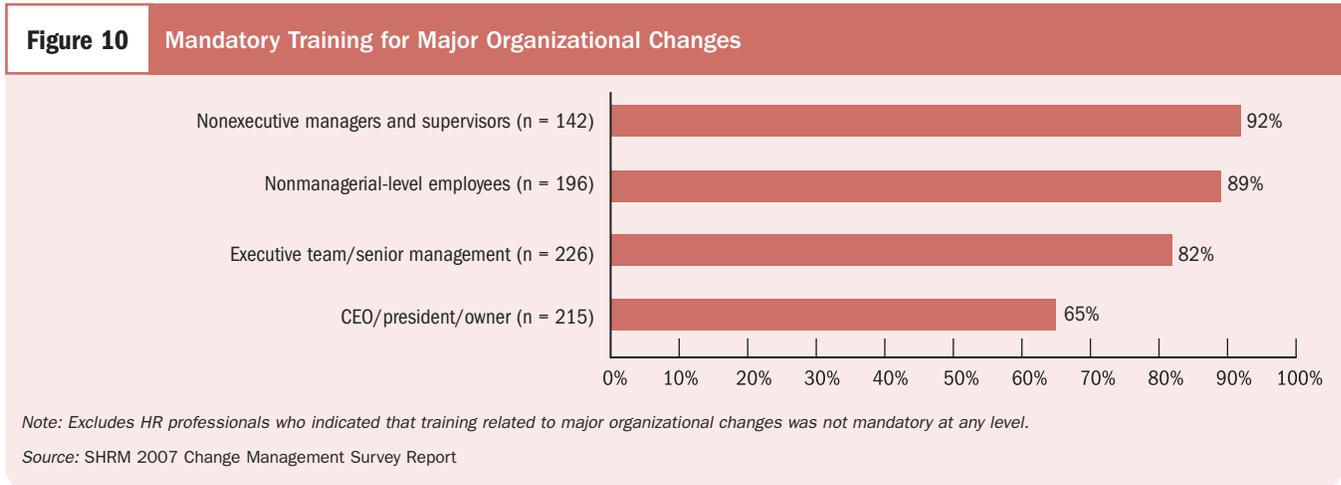
Source: SHRM 2007 Change Management Survey Report

### Obstacles, Evaluations and Outcomes of Major Organizational Changes

What are the main challenges and obstacles that organizations face during major changes? According to HR professionals, while major organizational changes are planned or in progress, challenges more frequently originate from within the organization than from external sources (Figure 12). Employee resistance (76%) was the obstacle most frequently experienced during major organizational changes. Nearly three-quarters of organizations reported communication breakdown (72%), and almost one-half indicated

that insufficient time devoted to training (44%) posed challenges during major organizational change. The smallest percentage of organizations (12%) reported that their major organizational changes were challenged due to downturn in the market or economy.

Large-staff-sized organizations (81%) were more likely than small-staff-sized organizations (63%) to report that their major organizational changes had been challenged by communication breakdown. Large organizations (44%) were also more likely than small (26%) and medium organizations (23%) to report that



costs exceeded the budget for their major organizational changes. These data are shown in Table 24.

As depicted in Table 25, differences among organization sectors were identified for three obstacles

or challenges that organizations faced during major changes. HR professionals employed by government agencies (94%) were more likely to report having encountered employee resistance to changes, compared with respondents employed by privately owned

**Table 22** Employee Training for Major Organizational Changes (by Organization Staff Size)

	Overall (n = 291)	Small (1-99 Employees) (n = 75)	Medium (100-499 Employees) (n = 109)	Large (500 or More Employees) (n = 93)	Differences Based on Organization Staff Size
Group or one-on-one sessions led by an instructor	79%	76%	81%	80%	
Hardcopy training manuals, job aides or other documentation	51%	47%	52%	54%	
Online (i.e., downloadable) training manuals, job aides or other documentation	43%	36%	32%	57%	Large > small, medium
E-learning modules through organization's Web site	28%	8%	26%	44%	Medium > small Large > small, medium
Software-based tutorials	16%	11%	11%	26%	Large > small, medium

*Note: Data sorted in descending order by "overall" column. Excludes HR professionals who indicated that their employees had not received training related to major organizational changes. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and information about training related to major organizational changes.*

Source: SHRM 2007 Change Management Survey Report

**Table 23** Employee Training for Major Organizational Changes (by Organization Sector)

	Overall (n = 291)	Publicly Owned For-Profit Organization (n = 84)	Privately Owned For-Profit Organization (n = 127)	Nonprofit Organization (n = 69)	Government Agency (n = 31)	Differences Based on Organization Sector
Group or one-on-one sessions led by an instructor	79%	66%	82%	84%	85%	
Hardcopy training manuals, job aides or other documentation	51%	45%	52%	56%	56%	
Online (i.e., downloadable) training manuals, job aides or other documentation	43%	54%	39%	33%	41%	
E-learning modules through organization's Web site	28%	43%	21%	23%	22%	Publicly owned for-profit organization > privately owned for-profit organization
Software-based tutorials	16%	26%	10%	18%	11%	Publicly owned for-profit organization > privately owned for-profit organization

*Note: Data sorted in descending order by "overall" column. Excludes HR professionals who indicated that their employees had not received training related to major organizational changes. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization sector categories are based on the actual number of respondents who provided their organization sector and information about training related to major organizational changes.*

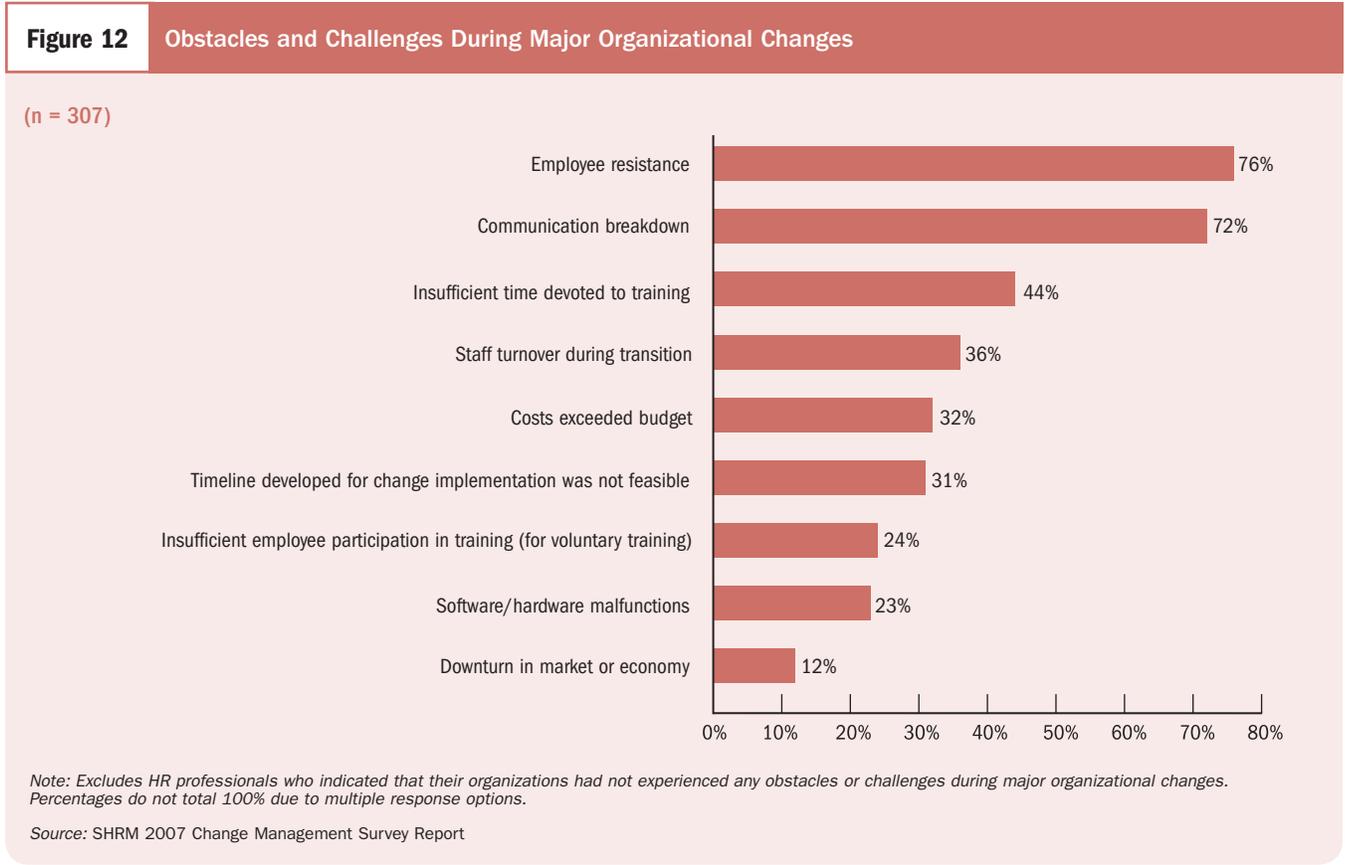
Source: 2007 Change Management Survey Report

for-profit organizations (69%). According to HR professionals, publicly owned for-profit organizations (59%) were more likely than nonprofit organizations (35%) to report that their major organizational changes were challenged by insufficient time devoted to training. Publicly owned for-profit organizations (53%) were more likely than privately owned for-profit organizations (30%) and nonprofit organizations (26%) to report that staff turnover during the transition presented an obstacle to their major organizational changes.

According to HR professionals, fewer than one-third of organizations (32%) conducted evaluations of the change management initiatives after major organizational changes had been implemented. These data are shown in Figure 13.

As shown in Table 26, large-staff-sized organizations (44%) were more likely than medium- (26%) or small-staff-sized organizations (25%) to have conducted evaluations of their change management initiatives following implementation of major changes. Larger organizations undoubtedly have greater resources and more at stake to allow them to conduct evaluations. Larger organizations may also be more likely to be subject to external expectations for post-implementation evaluations of changes.

The impetus for conducting evaluations of change management initiatives is evidently less sensitive to organization sector than to other organization characteristics. Although publicly owned for-profit organizations (39%) reported the largest percentage of post-implementation evaluations compared with other



**Table 24** Obstacles Encountered During Major Organizational Changes (by Organization Staff Size)

	Overall (n = 307)	Small (1-99 Employees) (n = 82)	Medium (100-499 Employees) (n = 112)	Large (500 or More Employees) (n = 105)	Differences Based on Organization Staff Size
Employee resistance	76%	76%	73%	80%	
Communication breakdown	72%	63%	67%	81%	Large > small
Insufficient time devoted to training	44%	39%	40%	52%	
Staff turnover during transition	36%	33%	33%	42%	
Costs exceeded budget	32%	26%	23%	44%	Large > small, medium
Timeline developed for change implementation was not feasible	31%	26%	26%	37%	
Insufficient employee participation in training (for voluntary training)	24%	16%	27%	29%	
Software/hardware malfunctions	23%	23%	22%	23%	
Downturn in market or economy	12%	10%	12%	13%	

*Note: Data sorted in descending order by "overall" column. Excludes HR professionals who indicated that their organizations had not experienced any obstacles or challenges during major organizational changes. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and information about obstacles or challenges encountered during major organizational changes.*

Source: SHRM 2007 Change Management Survey Report

**Table 25** Obstacles Encountered During Major Organizational Changes (by Organization Sector)

	Overall (n = 307)	Publicly Owned For-Profit Organization (n = 81)	Privately Owned For-Profit Organization (n = 118)	Nonprofit Organization (n = 65)	Government Agency (n = 31)	Differences Based on Organization Sector
Employee resistance	76%	75%	69%	80%	94%	Government agency > privately owned for-profit organization
Communication breakdown	72%	72%	69%	74%	81%	
Insufficient time devoted to training	44%	59%	42%	35%	35%	Publicly owned for-profit organization > nonprofit organization
Staff turnover during transition	36%	53%	30%	26%	42%	Publicly owned for-profit organization > privately owned for-profit organization, nonprofit organization
Costs exceeded budget	32%	35%	32%	31%	26%	
Timeline developed for change implementation was not feasible	31%	35%	25%	31%	39%	
Insufficient employee participation in training (for voluntary training)	24%	25%	21%	26%	35%	
Software/hardware malfunctions	23%	22%	26%	12%	32%	
Downturn in market or economy	12%	17%	10%	12%	6%	

*Note: Data sorted in descending order by "overall" column. Excludes HR professionals who indicated that their organizations had not experienced any obstacles or challenges during major organizational changes. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization sector categories are based on the actual number of respondents who provided their organization sector and information about obstacles or challenges encountered during major organizational changes.*

Source: SHRM 2007 Change Management Survey Report

organization sectors, this difference was not statistically significant (Table 27).

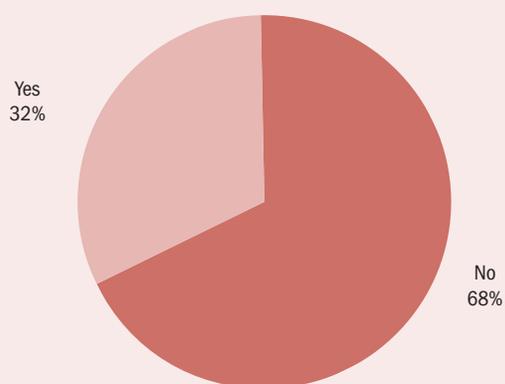
As shown in Table 28, organizations that conducted post-implementation evaluations of their change

management initiatives reported a significantly greater average number of major organizational changes during the 24 months prior to the survey, compared with organizations that did not conduct post-implementation evaluations of their major changes. This finding suggests that the more experience organizations have with implementing major changes, the more likely they are to evaluate the success of their change management programs and activities. This could be due to anticipating future major organizational changes and desiring to identify best practices to incorporate and obstacles and challenges to avoid in future change management initiatives.

HR professionals were asked to identify the top three positive outcomes resulting from HR involvement in change management initiatives. Nearly three-quarters of HR professionals reported that when HR was involved in their organizations' change management processes, employee understanding of the change improved (74%). More than one-half of HR professionals (55%) reported that communication improved between managerial and nonmanagerial employees,

**Figure 13** Post-Implementation Evaluations of Change Management Initiatives

(n = 254)



Notes: Excludes HR professionals who responded "not sure."

Source: SHRM 2007 Change Management Survey Report

**Table 26** Post-Implementation Evaluations of Change Management Initiatives (by Organization Staff Size)

	Overall (n = 254)	Small (1-99 Employees) (n = 67)	Medium (100-499 Employees) (n = 97)	Large (500 or More Employees) (n = 81)	Differences Based on Organization Staff Size
Yes	32%	25%	26%	44%	Large > small, medium
No	68%	75%	74%	56%	

Notes: Excludes HR professionals who responded "not sure." Blank cells indicate that no statistically significant differences were found.

Source: SHRM 2007 Change Management Survey Report

**Table 27** Post-Implementation Evaluations of Change Management Initiatives (by Organization Sector)

	Overall (n = 254)	Publicly Owned For- Profit Organization (n = 56)	Privately Owned For- Profit Organization (n = 100)	Nonprofit Organization (n = 61)	Government Agency (n = 25)	Differences Based on Organization Sector
Yes	32%	39%	30%	30%	28%	
No	68%	61%	70%	70%	72%	

Notes: Excludes HR professionals who responded "not sure." Blank cells indicate that no statistically significant differences were found.

Source: SHRM 2007 Change Management Survey Report

**Table 28** Average Number of Major Organizational Changes (by Post-Implementation Evaluations of Change Management Initiatives)

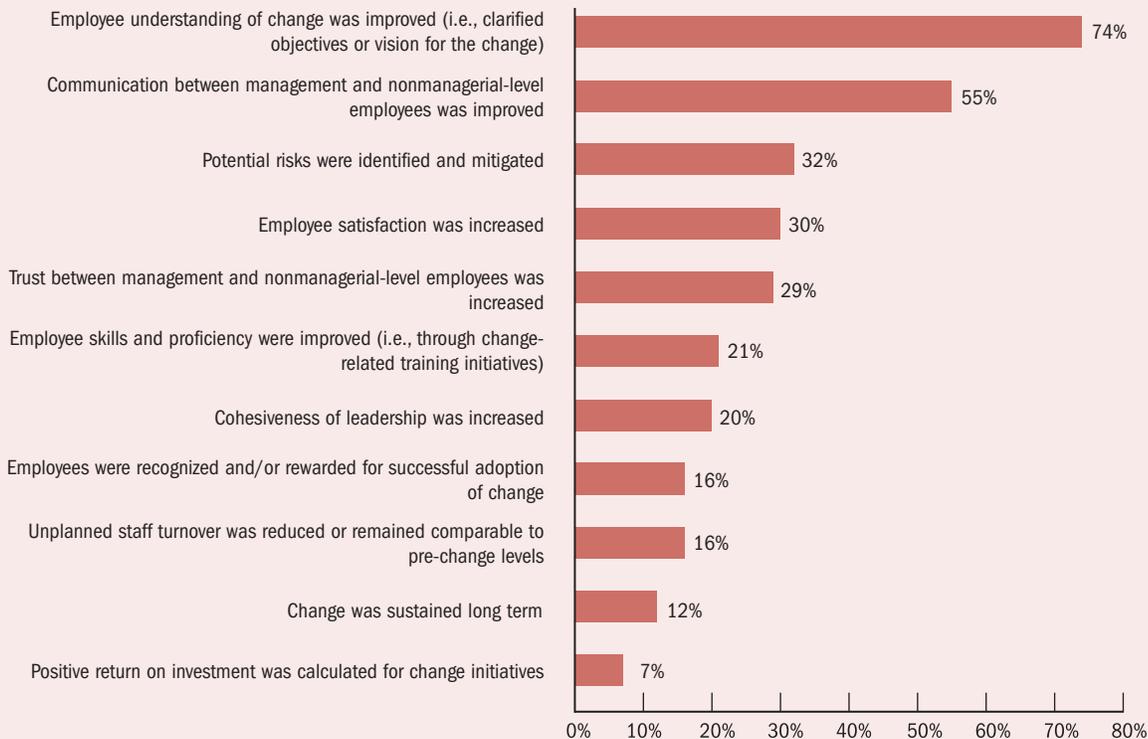
Overall (n = 305)	Post-Implementation Evaluations (n = 81)	No Post-Implementation Evaluations (n = 173)	Differences by Post-Implementation Evaluations
4.20	4.85	3.77	Post-implementation evaluations > no post-implementation evaluations

Notes: Excludes HR professionals who responded “n/a” or “not sure” about changes, those who indicated that changes were aborted or abandoned and those who responded “not sure” to this item. The sample sizes and percentages shown in the evaluation categories are based on the actual number of respondents who provided information about their post-implementation evaluations and information about their major organizational changes.

Source: 2007 Change Management Survey Report

**Figure 14** Positive Outcomes of HR Involvement in Change Management

(n = 295)



Notes: Excludes HR professionals who indicated that their HR departments were not involved in processes related to major changes in their organizations. Percentages do not total 100% due to multiple response options.

Source: SHRM 2007 Change Management Survey Report

and nearly one-third of respondents (32%) indicated that potential risks were identified and mitigated as a result of HR involvement in change-related processes. The smallest percentage of HR professionals (7%) indicated that a positive return on investment was calculated for the change due to HR involvement in the change management processes. These data are illustrated in Figure 14.

As depicted in Table 29, small-staff-sized organizations (36%) and medium-staff-sized organizations (36%) were more likely than large-staff-sized organizations (17%) to have reported increased employee satisfaction as a positive outcome of HR's involvement in change management processes. HR depart-

ments at small and medium organizations may be able to connect more personally with a greater proportion of employees during change management initiatives and thus perceive more direct contribution to improved employee satisfaction.

Positive outcomes of change management processes were fairly consistently attributed to HR involvement across organization sectors. One difference emerged among sectors: publicly owned for-profit organizations (23%) were more likely than nonprofit organizations (6%) to report that employees were recognized and/or rewarded for successfully adopting the change initiated within the organization (Table 30).

**Table 29** Positive Outcomes of HR Involvement in Change Management (by Organization Staff Size)

	Overall (n = 295)	Small (1-99 Employees) (n = 67)	Medium (100-499 Employees) (n = 107)	Large (500 or More Employees) (n = 93)	Differences Based on Organization Staff Size
Improved employee understanding of change (i.e., clarified objectives or vision for the change)	74%	73%	78%	72%	
Improved communication between managerial and nonmanagerial employees	55%	52%	56%	61%	
Potential risks were identified and mitigated	32%	24%	31%	37%	
Increased employee satisfaction	30%	36%	36%	17%	Small > large Medium > large
Increased trust between managerial and nonmanagerial levels of employees	29%	36%	28%	29%	
Improved employee skills and proficiency (i.e., through change-related training initiatives)	21%	28%	19%	16%	
Increased cohesiveness of leadership	20%	19%	18%	25%	
Employees were recognized and/or rewarded for successful adoption of change	16%	16%	18%	13%	
Unplanned staff turnover was reduced or remained comparable to pre-change levels	16%	7%	17%	17%	
Change was sustained long term	12%	7%	16%	14%	
Positive return on investment was calculated for change initiatives	7%	7%	5%	11%	

Notes: Data sorted in descending order by "overall" column. Excludes HR professionals who indicated that their HR departments were not involved in processes related to major changes in their organizations. Percentages do not total 100% due to multiple response options. The sample sizes and percentages shown in the organization staff size categories are based on the actual number of respondents who provided their number of employees and information about positive outcomes resulting from HR involvement in major organizational changes. Blank cells indicate that no statistically significant differences were found.

Source: SHRM 2007 Change Management Survey Report

**Table 30** Positive Outcomes of HR Involvement in Change Management (by Organization Sector)

	Overall (n = 295)	Publicly Owned For-Profit Organization (n = 75)	Privately Owned For-Profit Organization (n = 106)	Nonprofit Organization (n = 54)	Government Agency (n = 26)	Differences Based on Organization Sector
Improved employee understanding of change (i.e., clarified objectives or vision for the change)	74%	69%	77%	80%	73%	
Improved communication between managerial and nonmanagerial employees	55%	60%	55%	59%	42%	
Potential risks were identified and mitigated	32%	32%	28%	33%	35%	
Increased employee satisfaction	30%	31%	34%	28%	15%	
Increased trust between managerial and nonmanagerial levels of employees	29%	20%	37%	33%	19%	
Improved employee skills and proficiency (i.e., through change-related training initiatives)	21%	17%	22%	22%	27%	
Increased cohesiveness of leadership	20%	21%	19%	22%	19%	
Employees were recognized and/or rewarded for successful adoption of change	16%	23%	18%	6%	12%	Publicly owned for-profit organization > nonprofit organization
Unplanned staff turnover was reduced or remained comparable to pre-change levels	16%	15%	17%	11%	12%	
Change was sustained long term	12%	17%	14%	7%	8%	
Positive return on investment was calculated for change initiatives	7%	9%	8%	6%	4%	

Notes: Data sorted in descending order by "overall" column. Excludes HR professionals who indicated that their HR departments were not involved in processes related to major changes in their organizations. Percentages do not total 100% due to multiple response options. Blank cells indicate that no statistically significant differences were found. The sample sizes and percentages shown in the organization sector categories are based on the actual number of respondents who provided their organization sector and information about positive outcomes resulting from HR involvement in major organizational changes.

Source: SHRM 2007 Change Management Survey Report



# Conclusions

The results of this survey support the notion that major organizational changes have the potential to affect organizations across all levels of stakeholders. As the organizational department or function with primary responsibility for policies and practices affecting human capital, HR needs to be involved from the beginning when major organizational changes are being eyed for implementation. Indeed, this research finds that more often than not, HR is present during the organization's planning for major changes: among respondents whose HR departments were involved in processes related to major organizational changes, nearly three-quarters (73%) reported that HR became involved prior to the changes being introduced to employees. This indicates that not only is HR viewed as a strategic partner in decisions to implement changes, HR also has early input into developing change management initiatives.

In order for major organizational changes to be successfully implemented and fully adopted by employees, the change management approach must be well-planned and well-timed. Effective communication to employees is an essential step in promoting awareness and understanding of why the changes being implemented are necessary. HR professionals indicated multiple forms of communicating change-related information to employees (e.g., e-mails, meetings, training sessions, press releases), originating from multiple sources (e.g., executive management,

HR, other departments within the organization). Two-thirds of HR professionals (67%) reported that their organizations communicated changes by e-mails, voicemails or letters to employees from executive management, two-thirds of organizations (67%) reported that information about major changes was communicated in department meetings, slightly fewer than two-thirds (63%) reported using all-employee meetings to communicate changes and nearly one-half of organizations (46%) sent change-related e-mails, voicemails or letters to employees from HR. Organizations can help promote awareness of changes in the organization through frequent information and updates as well as consistent messages about the change initiatives, particularly when information about changes comes from multiple departments within the organization. Gaining employee support and trust for new processes and products will increase participation in and long-term acceptance of the changes being implemented.

After employees understand the changes being implemented and the factors that led to decisions to implement the changes, training should be provided to promote proficiency with and reinforcement of new processes. One out of 10 respondents indicated that their organizations did not provide employee training related to major organizational changes. According to HR professionals, organizations are using a variety of methods to train employees about major organizational changes. Nearly four out five organizations

(79%) offer group or one-on-one instructor-led training sessions, followed by one-half of organizations (51%) that provide hardcopy training manuals, job aides and other documents related to their major changes.

At this time, most organizations are not using change management consultant services or following particular change management models during their major organizational changes. Although organizations may develop proficiency with developing change management initiatives through multiple experiences with implementing major organizational changes, how do organizations know that they are selecting best prac-

tices for their change management programs? This is an area in which HR could be more involved. Only 32% of organizations reported conducting post-implementation evaluations of their change management programs. Organizations would be well-advised to measure the success of their change management initiatives in promoting long-term adoption of the changes among employees, identifying the strategies that worked well in accomplishing the change management goals and developing a systematic approach to change management that can be adapted for future changes within their organizations.

# An HR Perspective: Change Management

By Nancy Lockwood, M.A., SPHR, GPHR, Manager, HR Content Program

As noted in the *SHRM Glossary of HR Terms*, change management is defined as the systematic approach and application of knowledge, tools and resources to deal with change. Change management means defining and adopting corporate strategies, structures, procedures and technologies to deal with changes in external conditions and the business environment. The survey report findings highlight that 82% of HR practitioners have worked with change management initiatives in the past 24 months. In addition, HR was involved with major change at various stages of the change management process—73% were involved prior to the change being introduced, 22% were involved during the implementation and 5% got involved in the change initiative after it had gone into effect. In addition, 32% of HR professionals conducted post-implementation evaluations of change management initiatives. These data emphasize the overall integral HR role in change management.

Traditionally, HR has been known as the ‘change agent,’ someone who intentionally or indirectly causes or accelerates behavioral, cultural or social change.

With intention to improve the company for all stakeholders, HR change agents are motivated to find better ways to do things and make things happen in the organization. HR change agents most often focus on organizational culture and behavior and related processes. For example, the top three major organizational changes cited by survey respondents—new and/or revised performance management and review processes, major facilities changes and organizational culture changes—were directly related to the HR function.

Further, HR’s role in change management today has substantially expanded, with the focus on being a well-rounded, insightful and effective strategic business partner. As highlighted in a *Harvard Business Review* article “Cracking the Code of Change,”<sup>2</sup> change is either economically driven or focused on organizational development, or a combination of both, with the goal to maximize shareholder value and organizational development capabilities. Within the realm of change management are five primary dimensions of change: leadership, focus, process, reward system and use of consultants. Therefore, with

the goal of the organization to be competitive in its respective industry sector, HR professionals are increasingly playing a role in the strategic planning for change management initiatives.

As the survey findings reflect, however, there can be ‘bumps in the road’ that may have a negative effect on change management initiatives. According to the survey results, the following are among the most prevalent challenges: employee resistance (76%), communication breakdown (72%), insufficient time devoted to training (44%), staff turnover during transition (36%), costs exceeding budget (32%) and insufficient timeline developed for effective change implementation (31%).

Despite these challenges, HR has the ability to make a significant impact and contribution to the organization by initiating change, leading change and measuring change effectiveness. The top five areas where it is essential for HR to demonstrate value for change management are 1) clearly communicating plans and goals regarding change initiatives; 2) hiring and developing good leaders; 3) designing and implementing transparent reward systems;

<sup>2</sup> Beer, M., & Nohria, N. (2000, May-June). Cracking the code. *Harvard Business Review*, 137.

4) giving people the opportunity to be involved in the processes; and 5) overall, making each interaction with internal clients a positive experience. In addi-

tion to these recommendations, thoughtful and careful design and implementation that focus on clear and open communication and have appropriate time

tables will empower HR to be an effective strategic business partner in change management.

# Demographics

## Organization Staff Size

(n = 319)

Small organization (1-99 employees)	28%
Medium organization (100-499 employees)	39%
Large organization (500 or more employees)	34%

*Note: Percentages may not total 100% due to rounding.*

Source: SHRM 2007 Change Management Survey Report

## Organization Sector

(n = 324)

Publicly owned for-profit organization	40%
Privately owned for-profit organization	26%
Nonprofit organization	22%
Government agency	10%
Other	3%

*Note: Percentages may not total 100% due to rounding.*

Source: SHRM 2007 Change Management Survey Report

## HR Department Staff Size

(n = 313)

1-4	60%
5-9	15%
10-24	12%
25-49	8%
50-99	2%
100 or more	4%

*Note: Percentages may not total 100% due to rounding.*

Source: SHRM 2007 Change Management Survey Report

## Organization Industry

(n = 325)

Services (profit)	18%
Health	10%
Services (nonprofit)	10%
Manufacturing (durable goods)	9%
Educational services	8%
Manufacturing (nondurable goods)	7%
Government	6%
Wholesale/retail trade	6%
High-tech	5%
Finance	4%
Insurance	3%
Utilities	3%
Construction and mining/oil and gas	2%
Newspaper publishing/broadcasting	1%
Telecommunications	1%
Transportation	1%
Other	6%

*Note: Percentages may not total 100% due to rounding.*

*Source: SHRM 2007 Change Management Survey Report*

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