

Portfolio

Sheryl Stillman

Senior Communications and Change Management Consultant

WHAT IS CHANGE MANAGEMENT?

What it isn't...

- It isn't completing a list of to-do items
- It isn't filling in templates
- It isn't process improvement

So, what is it then?

- Simply put, it is the people-side of change.
- Change management is all about engaging, preparing, and supporting the people-side of change efforts.

WHY DO EMPLOYEES RESIST CHANGE?

FEAR OF UNKNOWN

LOW TRUST
CHANGE IN THE STATUS QUO
LACK OF COMPETENCE

LACK OF COMMUNICATION
NOT BEING CONSULTED
MISUNDERSTANDING ABOUT THE NEED FOR CHANGE

TEMPORARY FAD
POOR COMMUNICATION
CHANGES TO ROUTINES
EXHAUSTION/SATURATION

Expecting resistance to change and planning for it from the start of your change management program will allow you to effectively manage objections

SELF-ESTEEM

TIME

Denial, Anger, Confusion, Depression, Crisis, Acceptance, New confidence

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Communicate Strategically

Engage employees in a targeted, meaningful two-way conversation to ensure they feel connected and empowered

What are our Guiding Principles?

- Provide details as to the “why” and “benefit” in honest, transparent, and easy to understand ways
- Leverage “voice of” trusted leadership and peers to facilitate communication
- Generate grass roots buy-in from early adopters and influencers to drive success
- Create credible two-way and anonymous feedback loops to effectively address issues

Communication Plan

- Key messages
- Audiences
- Authors/senders
- Vehicles
- Cadences
- Feedback Mechanisms
- Communications Matrix

Communication Topics

- Why change? Why now?
- Areas of change (what, how, when, who)
- Benefits of change (WIIFM)
- FAQs (including new terminology)
- Best practices
- Success stories
- Where to go for help
- Lessons learned

Train Effectively

- Ensure all People Leaders are familiar with leading through change and ambiguity
- Provide all People Leaders with Developing and Coaching Curriculum
- Cross-train Ops Associates

Method	Description and Purpose	Audience	Date
Role Based Work Instruction training	<ul style="list-style-type: none"> • Supporting documentation of how to utilize the tool and its functionality. • Stored in a centrally accessible location 	<ul style="list-style-type: none"> • Partner Support 	
Process Maps for each workflow	End to end understanding of the system		
One-Pagers	High level view of the change, timelines, available resources and project contacts		
Video recordings of training and demos	How to modules that are recorded, each training module will have a recorded session		
FAQ's and quick reference guides	Quick references for most frequent questions and common problems		

Training Plan is being developed in partnership with IS/Ops/Training Teams

CELEBRATE SUCCESS

Employee recognition plays an important role in a company's culture and rewarding staff for their hard work has a number of benefits for both parties.

Showing your staff you appreciate them can increase productivity, encourage teamwork and even help to attract and retain talent to your business.

Rewards and Celebrations

Rewards should not be a one-time incidence

Allow people to travel to the celebration (adhering to guidelines)

Consider a volunteer event giving back to the community

Project teams often EXPECT a celebration, awards, and/or recognition

Use Company – branded material to engage employees and connect with the Firm

Gifts can be a small token (i.e., water bottle, cell phone stand, gift cards (if allowed))

Award ceremony should be planned in-advance

Company picnics, team happy hours, potlucks, are all ways to celebrate a job well done

Combine celebration with Lessons Learned as another way to come together

Reframing Mindsets and Behaviors Drives Sustainable Change

SHERYL STILLMAN CONSULTING

Coaching towards success.

Mission Statement

To make a positive difference in the lives of those around me. This theme is central to my coaching practice. Helping companies and individuals recognize what is getting in the way of their success only happens through self-discovery.

I guide clients in finding **the power to create change.**

Executive & Life Coaching

Coaching helps you discover or align what is happening (or not) with your values and beliefs. Additionally, coaching creates self-awareness of how you respond to the world around you. It is a process and not a "quick fix." Coaching is not a substitute for therapy. While these two modalities can overlap, the overarching goal of coaching is to design ways to **understand yourself** and **take action that brings you peace.**

Why Me?

I provide a **safe, confidential space** for you to brainstorm, reflect, and move forward. Clients have shared my value lies in asking insightful questions, being honest, and providing direct feedback, which leads to greater emotional intelligence and personal acceptance.

"Sheryl is very thoughtful in her approach to change management and helped us through a large reorganization of our teams into divisions. She also personally helped coach me as an Executive and I will always be grateful for her sage advice!"

- Colleen Bell, President, Innovation & Experience, Cambridge Investment Research

Why Work With a Coach?

With life and work blurring together, I coach executives and individuals in transition at home or in the office.

Below are some common situations in which coaching is helpful.

Navigating organizational culture.

Seeking new (or refining) leadership skills.

Leading and managing change.

Identifying and achieving goals.

Changing jobs or career choice.

Finding purpose after kids leave the nest.

Get in Touch



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How can business stakeholders help?

Provide Department-Specific Information

- Help the project team understand how the business area best receives and absorbs information
- Utilize existing communications vehicles to ensure outreach to appropriate audiences

Tailor Messaging

- Add business context to messages for increased relevance as subject matter experts
- Convey project decisions and direction from the end user perspective

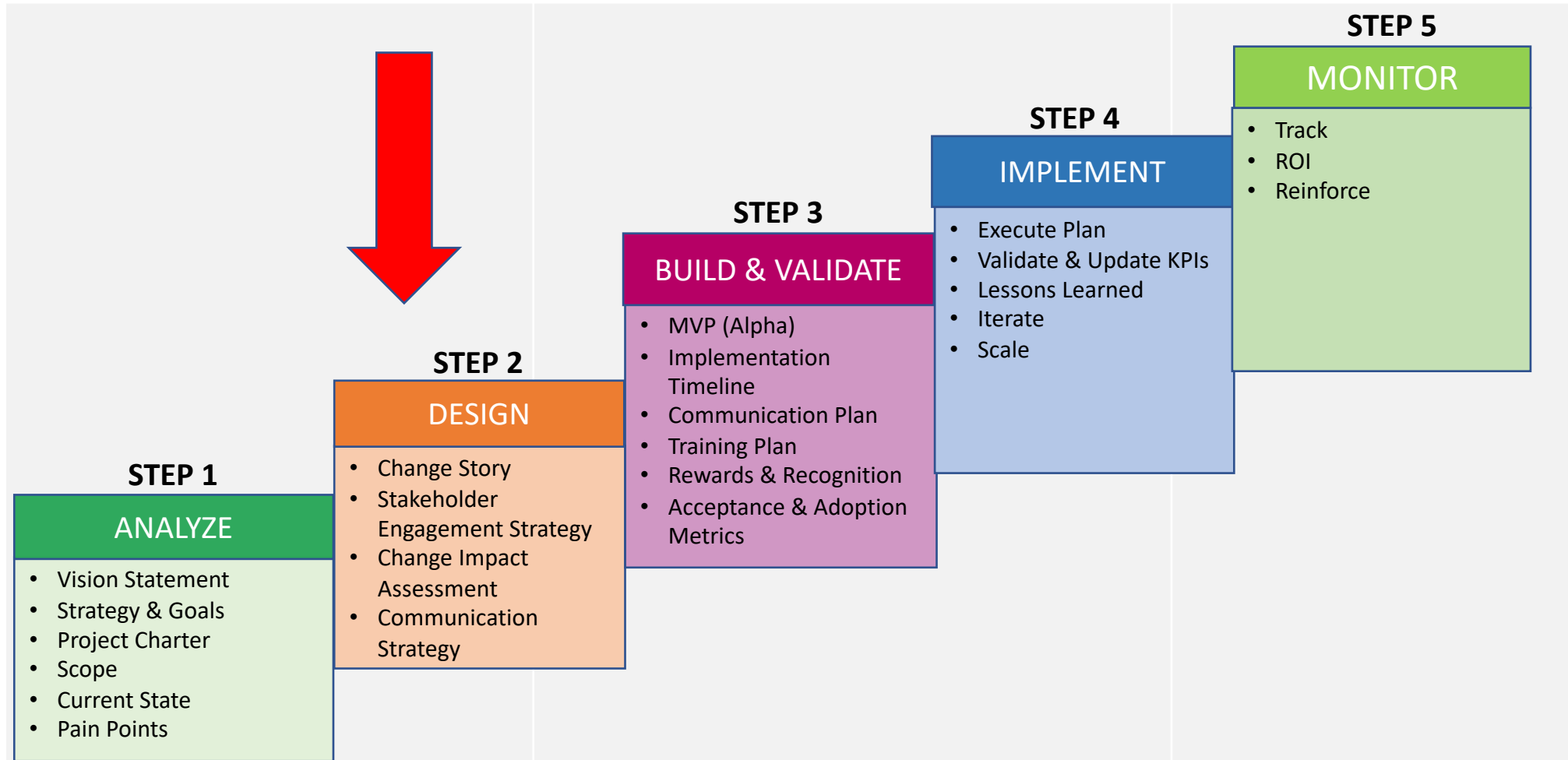
Support Issue Resolution

- Identify department concerns or resistance and raise to the project team for tracking and mitigation
- Communicate updates from the project team to address business concerns

Engage Department Leaders

- Involve leadership in message review/approval and readiness activities
- Share high-level project plans and information to inform and gain buy-in

CHANGE MANAGEMENT PLANNING



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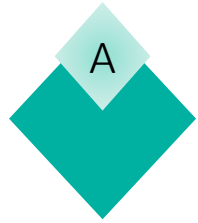
Expecting resistance to change and planning for it from the start of your change management program will allow you to effectively manage objections

SELF-ESTEEM vs TIME

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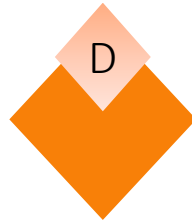
HOW DO YOU IMPLEMENT CHANGE?

Emotionally-connecting individuals with the “why” behind small changes or through an organization’s transformation is critical to successfully moving from one way of being (or doing) to another.



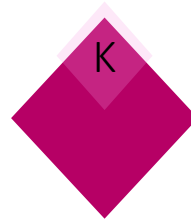
AWARENESS

- What problem are we solving?
- What is our vision for the future?
- What are our goals?
- Why do we have to change?
- What are the risks for not changing?
- What is changing?
- What is not changing?
- When will things begin to change?



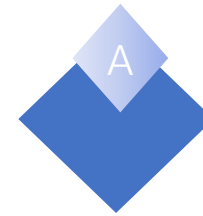
DESIRE

- What’s in it for me?
 - What’s in it for the organization?
- └── Benefits ─┘
- Address fears
 - Manage ambiguity



KNOWLEDGE

- Learn to think differently
- Provide tools for change (job aids, lunch n’ learns, etc.)
- Train new leadership, soft, and technical skills
- Set performance targets
- Provide mentorship



ABILITY

- Ensure proficiency
- Fill knowledge gaps
- Allow time to develop skills
- Coach for performance



REINFORCEMENT

- Celebrate successes
- Reinforce changes

COMMUNICATE



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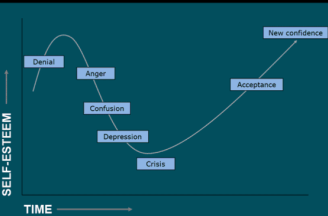
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Samples and Templates

X - Communications Strategy and Plan

Background:

Communication Objectives:

Target Audience(s):

Key Messages:

(The “why” behind the initiative/change—regulatory, improved tech/process, benefits by audience/user, timing, and action needed)

Potential Issues to Manage:

(Examples: change fatigue, multiple simultaneous requests)

Areas/Messages to be Considered for future Communications... [pick any/all that apply; add in anything missing]

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Marketing Materials and Events:

(Examples: One-page overview for internal and/or external audiences, SWAG, other items requested)

Success Metrics, as needed:

(Examples: Open rate, survey for understanding, etc.)

Communication Plan and Timing:

Timing	Activity	Recipient(s)	Sender (applicable leader)	Resources

See full communication details here:

(link to site where expanded plan is housed; including draft due dates, person responsible for preparing message(s), reviewer(s) and approver)

Phase 1 Corporate Communication Plan

Month/Week	September	October	November	December
Week 1				
Week 2				
Week 3				
Week 4				
Week 5				

Purpose: Create an ongoing cadence for employee engagement, ensuring consistency in messaging, and providing relevant transparency through existing communication channels.

Process: We will leverage existing channels, including X, X, and X o connect and communicate with employees.

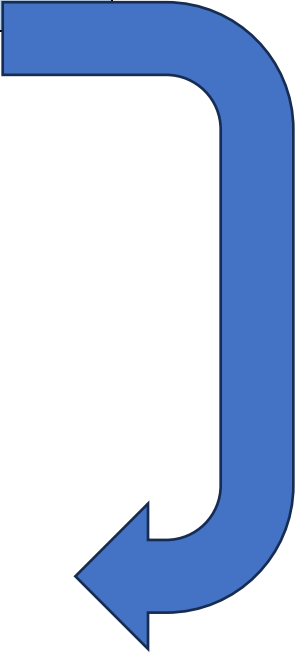
Payoff: The anticipated benefit of creating a cadence is integrating transformation activities into the day-to-day rhythm of all employees resulting in active contributions throughout the program and accelerated commitment to the new ways of working.

COMMUNICATION PLAN – EXCEL SAMPLE

Line #	Date of communication	Impacted business/functional area(s)	Impacted Tool(s)	What's changing	Phase of Change	Communication objective -- What are you trying to accomplish with this communication	ADKAR Target	Audience <i>VPs and above, Directors, Managers, Supervisors, Directly impacted groups, Indirectly impacted groups, Enterprise-wide, Financial Professionals, Clients</i>	Key message -- What do you want the audience to remember?
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Communication Tool	Frequency	Content SME	Content provider/writer	Content approver(s)	SMEs for Review	Date Corp. Comm. Form Submitted	Target Date - First Draft	Target Date - Final Draft	Status
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Notes	Communications or Change-related Activity
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Impacted Stakeholders and Engagement Strategy

Stakeholder group	Need	Engagement strategy
Executive Council/Leadership Council/Change Managers	<ul style="list-style-type: none"> ▪ Awareness: understand what NAO is, why it is important, what value it will provide to the business ▪ Sponsorship: encourage their teams to actively participate in implementation/adoption of NAO; champion the change ▪ Desire: to participate and support the change to improve the end-to-end client and associate experience 	<ol style="list-style-type: none"> 1) Introduce concept of NAO and Benefits, WIIFM 2) Request sponsorship and engagement from their team; actively champion support 3) Provide monthly updates 4) Coach, as needed 5) Change Leaders to assess opportunities and plan key activities
IS/IT/PM/FS/Legal & Compliance/Marketing/Trading, Accounting, Recruiting, BD Teams	<ul style="list-style-type: none"> ▪ Awareness: understand what NAO is, why it is important, what value it will provide to the business, the expected time commitment ▪ Sponsorship: encourage their teams to actively participate in the implementation/adoption of NAO; champion the change ▪ Desire: to participate and support the change to improve the end-to-end client and associate experience ▪ Knowledge: of what's changing as a result of NAO 	<ol style="list-style-type: none"> 1) Introduce concept of NAO Benefits, WIIFM 2) Request sponsorship and engagement from their team; actively champion support 3) Provide information around what's changing – bridge the gap between old and new processes and ways of working 4) Provide reference materials for NAO 5) Provide resources to assist with questions 6) Partner with peers, drive engagement and understanding
Partner Support/OAS/OAD/Cashiering	<ul style="list-style-type: none"> ▪ Awareness: understand what NAO is, why it is important, what value it will provide to the business ▪ Desire: to participate and support the change to improve the end-to-end client and associate experience ▪ Knowledge: of what's changing as a result of NAO ▪ Ability: to consistently and accurately execute business processes ▪ Reinforce: Celebrate milestones, performance manage 	<ol style="list-style-type: none"> 1) Introduce concept of NAO, Benefits, WIIFM 2) Provide information on what's changing – bridge the gap between old and new processes and ways of working 3) Provide information and training on how to execute new business processes 4) Provide reference materials for NAO 5) Provide resources to assist with questions 6) Partner with peers, drive engagement and understanding

ILLUSTRATIVE ONLY

NAO Communication Vehicles





Description	Target Audience	Content	Timing	Delivery Method	Sender
Awareness presentation	<ul style="list-style-type: none"> Executive Council Leadership Council 	Business reason for change, why employees should want to participate, impact of change on employees, how the change is happening, and details.	January '22	Manager Town Hall	CLT
Awareness One-Pager (presentation leave-behind)	<ul style="list-style-type: none"> Leadership Council All Associates 	Summary level: Business reason for change, why employees should want to participate, impact of change on employees, how the change is happening, and details.	January '22	Cambridge Today (link to Intranet?)	N/A
Roadshow presentations	<ul style="list-style-type: none"> Departments (rolled out by level of impact) 	<p>Business reason for change, why employees should want to participate, impact of change on employees, how the change is happening, and details.</p> <p><u>For Impacted Teams:</u> Roles & expectations for managers and supervisors, impact of change on employees, details about the change, how it will be implemented, and how they will be prepared for the change.</p> <p><u>For Teams NOT directly impacted:</u> Provide awareness, provide high-level details about the change, how it will impact the firm and associates, answer questions, and provide support.</p>	One month before Go-Live	Team Meetings	CLT Member(s)
Town Hall Updates	<ul style="list-style-type: none"> Managers All Associates 	Milestones, baseline development, and info after Go-Live. Objectives, testimonials/wins	<ul style="list-style-type: none"> January '22 After Go-Live 	<ul style="list-style-type: none"> Live Q&A Testimonials 	Amy, Colleen, Kevin, Jeremy, Kristi, tbd
Digital Transformation Newsletter (TBD)	<ul style="list-style-type: none"> All Employees 	Updates on all Digital Transformation initiatives	<ul style="list-style-type: none"> March '22 	<ul style="list-style-type: none"> Intranet / SharePoint Link 	CM/PRCM Teams
Leadership Videos	<ul style="list-style-type: none"> People Leaders 	[consider for NAO, Digital Transformation, and Enterprise messaging]	<ul style="list-style-type: none"> Quarterly? 	<ul style="list-style-type: none"> Scheduled Call 	Executive Council
FAQs	<ul style="list-style-type: none"> People Leaders Impacted Audiences All Employees 	Ongoing list of frequently asked questions and responses	<ul style="list-style-type: none"> Ongoing 	<ul style="list-style-type: none"> Intranet/Share Point Link 	CM Team

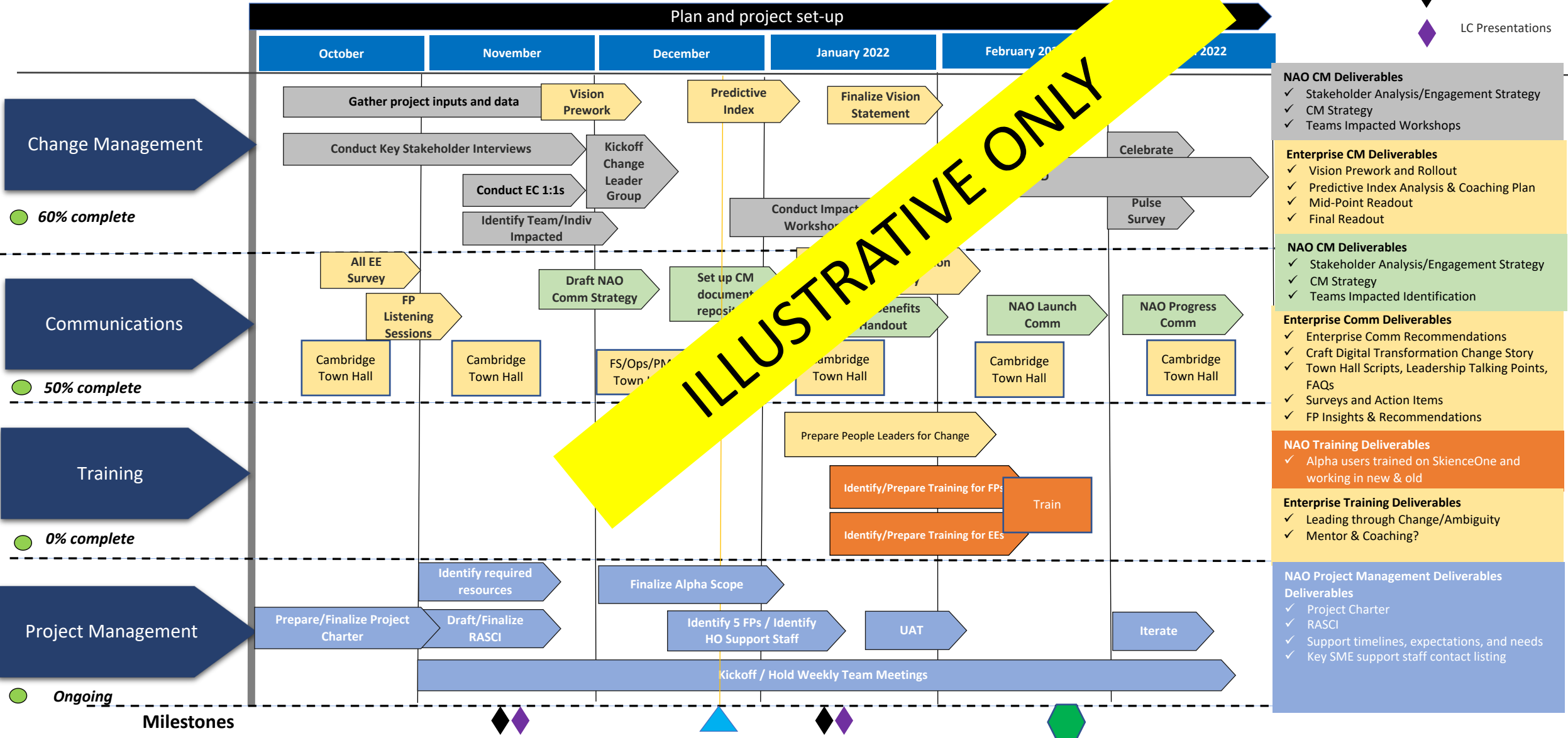
ILLUSTRATIVE ONLY

Step 1 - Analyze/Prepare for Change

This slide represents the work and the output of the change management work targeted for New Account Open (NAO) - Alpha (February 2022)

Key Milestone Legend

-  Launch
-  Today
-  EC Presentations
-  LC Presentations



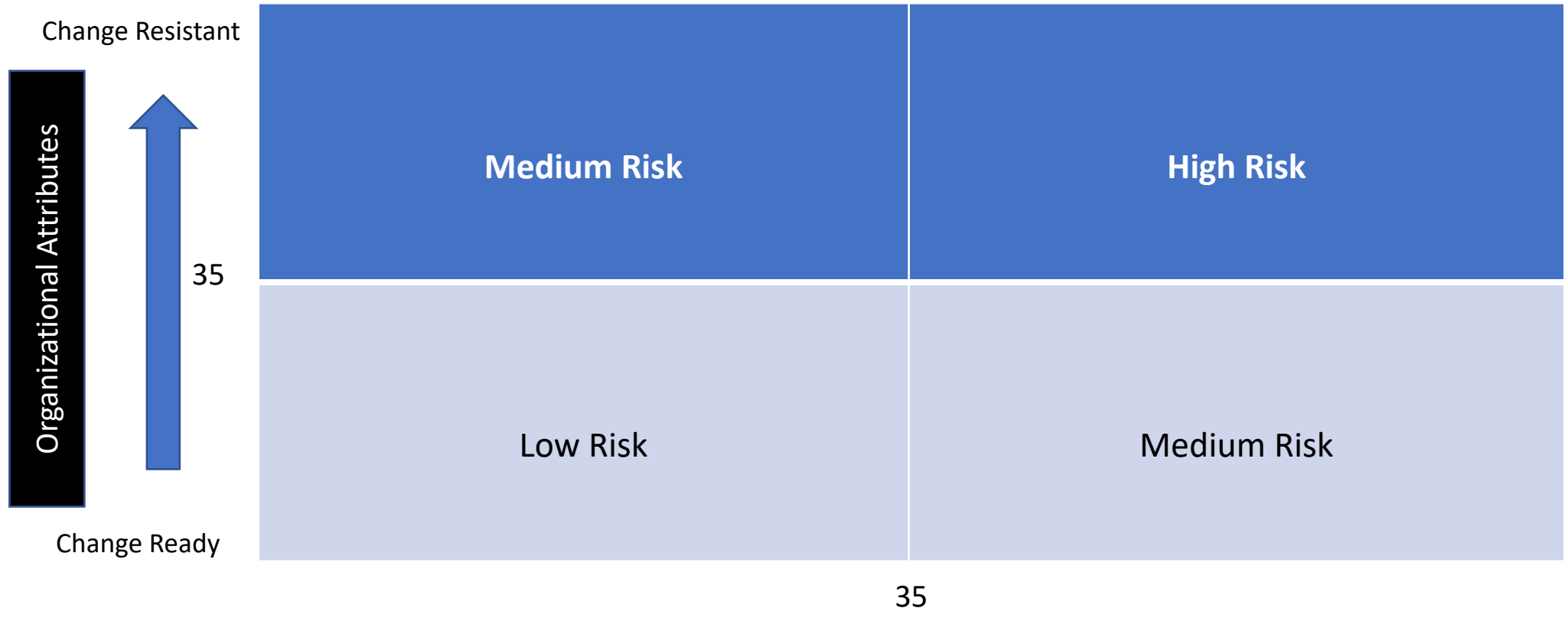
ORGANIZATIONAL READINESS ASSESSMENT

Based on initial stakeholder interviews, company-wide survey results, and consultant feedback, Cambridge scored X and X in terms of readiness around successful and sustained change efforts.

Department	Awareness of Digital Transformation	Openness to Change	Capacity for Transformation (Resources)	Overall Readiness Assessment	Comments
C-Suite					
Technology (IT/IS)					
Marketing / Communications					
Portfolio Management					
Fiduciary Services					
Training					
Business Development					
Compliance					
Advocacy & Supervision					
Corporate					

High Medium Low

ORGANIZATION CHANGE READINESS ASSESSMENT - CONTINUED



Stakeholder Interview Form

Sheryl Stillman Consulting, LLC

Stakeholder Interview Form

Program/Project Information	
Program/Project Name	
Go Live Date (projected date to impact people)	
Project Projected Completion Date:	
Project Description	

Interview Information	
Stakeholder Name	
Stakeholder Job Title	
Stakeholder Work Area	
Interview Date	
Interviewer(s)	

Summary of Change
1) What are we changing? (in your own words, can you articulate what we are changing?)
Need for Change
2) What is the burning platform to make this change? Why are we changing?
3) Why are we changing now?

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4) What is the risk of not changing?
5) What organizational enabler and imperative does this change align with an support? (articulate how you feel it fits with your team(s) strategies and meets company goals)
6) Have there been success metrics identified as part of the change?

Benefits of the Change
7) What are the benefits of the change to the Financial Professionals?
8) What are the benefits of the change to the associates?
9) What are the benefits of the change to the organization?

Impacts of the Change (what do stakeholders know and perceive)?
10) What will be changing for impacted teams (consider people, process, technology)

2

11) What business pain points does this change will address?
13) Which current employee pain points does this change address? (or are there things we should watch out for based on how the employee currently does their work?)
Change Impacts (Departments, Stakeholders)
13) Who are the key stakeholders impacted the most and need to be kept in the loop? (who will be touched by making the changes, who do we need to notify and keep engaged in our communication plan- consider members, providers, other business partners – describe to the best of your ability)?
14) Impacted Teams (include specific team names and number of individuals where possible, how will the change impact them – technology, process, organizational job structure, job roles)
15) Does this change have an impact on other change initiatives/projects?
16) What other change initiatives/projects could have an impact on this change initiative? (are there other projects happening at the same time where the same people are involved or there might be a requirement for coordination of efforts?)
17) Are there any considerations to performance metrics that need to be considered? (i.e. teams on productivity, impacts to performance pay-outs, bonuses if applicable)

3

Change Tactics Planning
18) How do you communicate with your team(s)? (daily stand-ups, email, current meetings and frequency – this will help identify where we can leverage existing methods to communicate and know what works best for your team(s))
19) Where are your team(s) located? Are any team members teleworkers? (This will help to plan how we conduct our change activities)
20) How are your team(s) typically trained? (and who trains them, some teams leverage other training resources than technical training)
21) Have there been changes that have gone well or have not gone well for your team(s) that we could learn from? (be as specific as possible to leverage best practices and to identify where we could do better)
22) Are there any team dynamics we should be aware of? (Personalities, long-term, mostly new, team that has had a lot of change (change saturation), etc.)
23) What overall obstacles/challenges do you anticipate?
24) Are your teams aware of the upcoming change? (What information have they received about the change)?
25) Do you feel that there are any risks or threats to the implementation of the project?

4

Change Catalyst Role Overview – New Account Open

NAO
Change Catalyst/Mentor Team

Change Leader Bi-Weekly Meetings

- A group of change champions that includes SMEs across the firm who are currently engaged in implementing New Account Open (NAO) within their respective areas
- Catalysts were identified by Business Lead and Sponsor
- Meetings to review project updates, share feedback, and stay connected with the NAO workstream

Role of a Change Catalyst

- Represent knowledge for a particular functional area within Cambridge
- Champion the change, drive adoption, and **provide change management support** across pre-determined departmental areas
- Gather feedback from their respective NAO user community and share insights with the core team
- Inform and educate users on NAO updates, information, and insights

Time Commitment

- Change Catalysts can expect to spend between 5-8 hours per month on communicating, training, and managing the change related to NAO
- This is an important role to the organization and the success of the NAO rollout, so all Change Champions are expected to be committed and engaged in their roles

Add individual names

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I hid in a closet with my elderly mom during a hurricane. It made me realize that sometimes children have to parent their parents.



Courtesy of Sheryl Stillman

- **A crisis provided time to reflect on being a mother in the sandwich generation.**
- **Becoming a parent to a parent doesn't happen suddenly but rather in bite-sized moments.**
- **Adjusting behavior and managing expectations are crucial in supporting ever-changing needs.**

I recently became an [empty nester](#), moved to Fort Myers, Florida, to care for my 81-year-old mother, and survived Hurricane Ian. Whether you're parenting a pet, child, or older loved one, it requires patience, unconditional love, and a level of responsibility that never seems to sleep.

Our job as moms is to steer our offspring from danger. As part of the sandwich generation, I recently added my mother to this list as we shift roles between who cares for whom.

Safeguarding my mom came quicker than I thought when a [Category 4 hurricane](#) zeroed in on our community. Though she was reluctant, I convinced her to leave her manufactured home and go with me to my concrete apartment building for safety.

I needed to connect with my own kids

On the eve of Ian and separated by several states, I texted my 24- and 22-year-old children requesting a video chat. As a single, working mom, I strived to be strong and not let them see the times when I was scared. I was always afraid when I traveled alone with the kids and felt the extra weight of returning them safely to their father after we were divorced. I had a similar goal now: Get my mom back home alive.

I planned to share that I was terrified. But after seeing worried faces pop up on the computer screen, my instincts to shield them from worry took over. I attempted to keep the conversation "light" while being realistic. Their grandmother made jokes. Neither approach worked. After hanging up and feeling like I had failed them, I turned to mom and said, "We will not die tomorrow."

When we rose in the morning, I announced we were going to a shelter. Hearing about 12-to-16-foot storm surges and visualizing swimming to the third floor from my ground-level unit was too much pressure. I've never even watched a single episode of "Survivor."

Preparing mentally and physically to hunker down

For a host of reasons — COVID, strangers, unfamiliar surroundings — routine is essential for those with [cognitive decline](#), and mom said she felt safer at home with me instead of going to a shelter. So we grabbed supplies and took cover in a bathroom and later in my walk-in closet when the rooms went dark, the wind howled, and the windows looked like we driving through a car wash.

Going through a natural disaster with someone with dementia is like taking a road trip with a toddler — "Are we there yet? Can we look? Why are the lights off?" Perhaps the only gift of this devastating disease is that memories of scary moments like these fade quicker.

Like many mother-daughter relationships, ours has been complicated. But we are each other's first line of support, complaining or laughing with one another, whether it was divorce (mine), loss of a spouse (hers), or dating woes (both of us).

Becoming the parent of the parent happens in small, bite-sized moments — like when my kids rescued me when flying off a banana boat, or when they both snorkeled alongside me, "just in case."

While hiding in the closet, I reflected on their young years and how each taught me to parent by adjusting my behaviors and expectations to meet their unique and growing abilities. As adults, we think we're in control, but our children often lead the way. Now that they are older, "mothering" continues evolving based on where they are in their own lives.

Hurricane Ian destroyed much of my mom's house. "You saved my life," she said. Between the blur of being a daughter and mom, I will keep her ever-changing needs top of mind, and try to guide her with flexibility, love, and a healthy dose of protection for good measure.