

LIZ GUTHRIDGE: Communicating outsourcing – lessons learned

While outsourcing has become more popular over the years and vendors have become more proficient, the transition period for a company making the change can still be painful, protracted and paralyzing. Liz Guthridge of Connect Consulting Group, suggests that communicators improve their chances for a smooth conversion and ongoing operational excellence, by following these 10 change communication steps:

1. Consider the outsourcing team a special target audience

This is an addition to HR, IT or whoever is involved. Recognize that the outsourcing team is overextended, overworked, overwhelmed and overfatigued – especially if the transition will cause them to lose their jobs. They need communication and change support that not only addresses the facts particular to their situation, but also acknowledges their anxiety and motivates them to keep going during difficult times. Good communication with this group goes far to help the overall outsourcing process. HR or IT (or the function doing the outsourcing) also needs attention as they must explain the change to managers and employees, and interact regularly with them.

2. View your outsourcing partner as a partner, not a vendor

Both organizations are in this together. You need to present a united front to the end-user customers, especially if you want the service to be perceived as seamless. It's important that all communication materials are consistent in content and tone, and reflect your company's unique culture. Make sure you involve each other when developing materials. Also, include your outsourcing partners' staff members in your new hire orientation and onboarding programs to familiarize them with your organization, including your history, culture and special language.

3. Explain the rationale and expectations

As with all other employee communication, tell people why you're making the changes and relate that to your overall business goals. If they know the context, they're more likely to accept the change. Be upfront about any new expectations and procedures for the outsourcing service, such as managers and employees needing to do more self-service. Better people know in advance and start to get used to it, rather than feel ambushed.

4. Support managers with communication and training

Be sure to provide support for managers to ensure they support the rationale, understand the benefits of the outsourcing, and know what the features are, and how to use them and keep using them correctly. Don't forget to include the managers' administrative coordinators and assistants as they may be helping their bosses with many of the steps now being outsourced. If not managed carefully, managers and assistants can derail the transition.

5. Test for misunderstandings

As much as possible, test your communication during the preparation stage with key audience groups to ensure they can follow the messages. Also, adjust and tweak messages as needed. This step is especially critical if you're consolidating policies and procedures and introducing new processes. It's even more important if the content, complexity and extent of the change vary by business unit and group. Some groups may need more communication and change support than others.

6. Create a migration strategy

To make sure new hires and new managers are onboard with the new way of doing things as soon as possible, update your orientation training sooner rather than later. Also, for them and everyone else, find and destroy old forms and documents to avoid confusion. If people have ready access to the old and comfortable, they'll tend to believe that stuff is more accurate than the communication you're sending.

7. Prepare for contingencies

Even with the best plans, efforts and intentions, things happen. So spend time planning what actions you might need to take if things go wrong. For example, what will happen if you can't make certain deadlines? What if the systems go down? What if the self-service features don't work? What if candidates can't submit resumes? The contingencies can go on and on, and if you're well prepared, you can handle any snafus as quickly as possible with respect – and maybe even some sympathy – from the adversely affected group.

8. Synchronize disaster planning with your outsourcing partner

From employees' perspective, you and your outsourcing partner are more than partners. You're akin to a married couple. Before the honeymoon ends, make sure you've worked at all the particulars. So when a laptop packed with employees' personal data gets stolen, a natural disaster strikes, or most of the call center staff comes down with the bird flu, you're prepared to do more than point fingers, wring hands or play the blame game. You want to be able to activate coordinated crisis plans. The goal is to present a united front, act competently, credibly and compassionately, and recover quickly without too much damage to each organization's reputation.

9. Build in feedback loops

Ask for feedback from team members, managers, employees and others all along the way. This is more than testing your messages; this is ensuring that people know what actions they need to take and by what deadlines, both for the transition and ongoing. They also need to know the consequences of doing nothing or not complying correctly. Are the instructions clear? Easy to follow? Rational? What can you learn from people's reactions so you can demonstrate you're listening to them as well as make continuous improvements in your processes?

10. Remind everyone of the good, bad and ugly

Be sure to circle back to key groups and individuals who are experiencing major changes, and make sure they fully recognize the implications of the changes. If possible, help them figure out how to adjust messages and actions to fit their audiences' needs. For example, after HR outsourcing, the local field HR staff might not have access to personal employee data as they once did. As a result, they may not be able to set up retirement planning sessions for eligible employees because they don't know who these individuals are. Figure out what to do differently to respond to the needs of HR, employees and the business.

By taking these actions, you can better demonstrate that outsourcing, offshoring or offloading, and all the related activities, are sensible, well-planned and better executed.

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