



## Coping with change management in a Product Information Management (PIM) implementation

### A Matrix White Paper

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# 1. Introduction:

The process of developing, producing, distributing and supporting products is now a complex task.

In many organisations, product information is stored in different silos, leading to inconsistent data, duplication of work, errors and ultimately reduced competitiveness and profitability.

Frequently, product information is owned and managed by different groups within the organisation, typically in different geographical locations. This has led to single views of the data being developed rather than the multi-dimensional, multi-channel approach that is now required for success.

The need for a central repository of company product information is therefore vitally important in ensuring that consistent and accurate information is available across multiple channels. Creating a single source will enable an organisation to collate, control and communicate product information both internally and externally.

When installing a PIM system to solve this problem, organisations are typically faced with a myriad of challenges. These include:

- **Cross-departmental roles**
- **Fear**
- **Scepticism**
- **Lack of knowledge of what others are doing**

## About this white paper:

Tried-and-tested techniques can help reduce the risk of failure when implementing a PIM (or any technology), and this white paper looks firstly at why change is likely to be occurring, before going on to discuss who needs to be involved, the change management cycle, key activities and deliverables.

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## 2. Why circumstances are likely to be changing

To implement a PIM, an orderly and fully-trained staff will need to become experienced in the art and science of change management. This will need to include exercises to help deal with passionate decision-makers who may be unwilling to change, see no need to change, or are fearful of what change might bring.

In many cases, sceptics represent less than 10% of the team, but their energy can quickly permeate to other team members and cause conflict, loss of desire to move forward, malaise and sometimes project stoppage.

However, when approaching the change using some straightforward methods, the success of the project increases dramatically. Therefore, the objective is to follow standard change management practices to help with the success rate.

Before we look at how to deal with change it will be useful to understand why that change is likely to be taking place. Typical scenarios of change are:

### 2.1 Duplicate entry of data:

This could come about in several ways. For instance, there may be multiple people entering the same data – like the pricing of a product e.g. graphic artist on the page, product manager in an Excel document, purchasing agent in the ERP.

### 2.2 Workflow expansion:

Over the years, because silos of information have developed independently, many workflows will need to take on additional steps to handle urgent requests with little or no collaboration between team members/ departments.

### 2.3 Inordinate amount of time spent:

This is related to the time spent in both the creative group and product management groups. Things that need to be considered include:

- **Copy** – Who is writing and at what point in the process? Are there different versions of the truth and should there be?
- **Images** – What is the filing system and time spent to find images? How are multiple images per SKU handled?
- **Pricing** – Are analytics available to help determine comparative pricing and page geography pricing? Can buyers communicate cost changes in an easy and fast manner?
- **Proofing** – Is proofing happening at the right time and by the right people using the right tools?
- **New product introduction** – Are products not getting to market in an appropriate time because of the length of time it takes to prepare material? Is there a balance and limit to the number of new products introduced?
- **Analytics** – What amount of time does the merchandising/product team spend assembling analytics and how are they presented?



## 2.4 Little integration with peripheral systems:

What is seen in many cases are legacy or ERP systems that have been customised so heavily that it's near impossible to change. Consequently, integration with these systems (and others) is imperative. Typically, we see four types of system that need to be considered:

- **ERP/legacy** – This is the business system. Many times it is antiquated and/or so highly customised that it cannot be replaced but needs to be integrated.
- **Web CMS** – These systems may have PIM capacity, but in a multi-channel environment having only a single-channel CMS still means duplicate data - therefore, integration will be needed.
- **CRM** – Although not always considered a CMS, having access to product data at the front-line sales level gives additional tools to the sales force allowing them to be more efficient at selling.
- **Files** – Documents (images, PDF files, Word files, Excel files, etc.) are also typically in unstructured locations and not packaged into any type of database

Getting access and integration to any or all of the systems above can be advantageous.



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## 3. Who will be involved in the process change?

It is important to understand the profiles of the people that will be included in this process change – but also, to make sure they are represented in the change process. Ideally, there will be a need to have front-line tactical users in these meetings.

### 3.1 Art/creative:

These are the graphic artists that build the pages (probably using a product like Adobe InDesign or Quark Xpress) and if copywriters are in this group, they should attend. Their needs are:

- Proofing cycle time and steps reduction
- Accurate and easily accessible data

### 3.2 Merchandising/product management:

These are the people assembling and resourcing products. They need to enter features / advantages/benefits (FABs), specifications and attributes, also to work with suppliers for the best data available. Their needs are:

- Reduction of duplicate entry of data
- Clarification of responsibilities and accountability including all the way to the supplier
- Accurate analytics
- Data governance

### 3.3 IT:

Coordinating and understanding all the systems involved makes this group intertwined in the process. Sometimes eCommerce resides in this group. Their needs are:

- Solutions to extend the life of the legacy/ERP
- Confidence in new software and hardware
- Data synchronised across the enterprise

### 3.4 eCommerce:

Another channel with a much more data- driven and sometimes myopic view of the system. Their needs are:

- Accessing and integrating data from other systems
- Data management that supports other eCommerce initiatives, like SEO

### 3.5 Marketing/sales:

This can be a mixture of marketing, business development and sales. The key for them will be revenue growth. Their needs are:

- What gives the competitive advantage - more products available (the endless aisle) and a faster new product introduction timeline
- Confidence in the data
- What's the ROI?

### 3.6 Managing director:

The head honcho will have to balance the needs across all the levels that report to him, including all of the above. Their needs are:

- Implementation through consultation and not being oversold – hitting the targets
- Integration with the business

## 4. The 7 step change management cycle

There are typically six stages to a change management cycle, but we are including a seventh. For the purpose of the Key Activities (section 5 of this white paper), we will be focusing on the second and third stages. The seven steps are:

### 4.1. Leadership and sponsorship:

It's important that the executive team is not just aware, but will be a proponent of the project, with at least one member of that group being positioned as a sponsor.

### 4.2. Identifying the current process:

This is the collection of the artefacts and capturing all the steps of the current process.

### 4.3. Creating the optimal process:

Once the current process is defined, then it's time to make it better by creating more efficient steps or improving existing steps.

### 4.4. Develop an implementation and training plan:

Many times, this is overlooked and the provider is counted on to provide this as a homogenised exercise. By customising the plan, the learning is ingrained during the training.

### 4.5. Implement and train:

This is carried out based on the workflow.

### 4.6. Maintenance and evolution:

Know that things will continue to change and those changes will need to be distributed across the user base. Past problems in silos will be avoided.

### 4.7. Project silence:

We think that it's important to bask in the rewards, or as some would say, the silence. This allows a re-generation of the passion and for the organisation to experience the rewards of the implementation.



## 5. Key activities

Before we look in some depth at the necessary activities to achieve steps 2 and 3 outlined in the previous section there are 2 things that need to be considered:

### Historical activities:

Has this been tried before? If so, what were the issues and did it succeed? If not, what were the reasons it did not? These are the questions to ask prior to activities commencing, to allow the facilitator to develop exercises around team building.

### Drawing lines in the sand:

In order to keep ideas on track, it's best to set some boundaries up front on what will NOT be covered. However, a contingency plan should be made for urgent needs that fall outside of the scope.

- **What won't be covered** – Typically, these should not be a part of the process improvement plan.
- **Job descriptions** – At the most, possibly bring in someone from HR at some point to review the progress.
- **Hierarchy changes** – This will be handled at the Executive level, and should be held off until after the process ... after all, you never know what may change "back" during the exercise.
- **Manuals** – Sometimes team members may want to jump ahead and begin with the process documentation. This should only happen when a "low-hanging fruit" change can be made. (See 5.1.4)

### 5.1 Activities necessary for achieving Steps 2 & 3

These include:

#### 5.1.1 Culture training:

- **Fear** – Converting or minimising sceptics, resistance and apathy.
- **"What is the question"** – This is a tremendous technique that can be used, whether in this exercise, or at home, with relatives or with friends. When you find yourself about to ask a question, try to frame it with a "What ..." (This is especially effective as an alternative to "Why ...")
- **"Why ..."** questions can carry energy that may bring a defensive reaction.
- **Try it, you'll like it!** (Don't ask me why)
- **Zenger-Miller principles** – These are principles in dialogue and communication that can be extremely beneficial in relationships, both collegial and in a reporting structure. Here are five to live by:
  1. Focus on the situation and not the person
  2. Maintain the self-confidence and self esteem of others
  3. Maintain constructive relationships
  4. Take initiative to make things better
  5. Lead by example



### 5.1.2 Facilitation:

Preferably, a facilitator will have little to no agenda to the final decision-making for which the group will be responsible. This person, more than any other, will need to be highly trained in the cultural techniques listed above.

With a little background about the project, the facilitator may be put in a situation to ask “dumb” questions. This is actually a great way to elicit responses from the team. It helps bring together people, who feel they are now in an educational mode.

### 5.1.3 Artefact gathering:

It is necessary to consider the following:

- **Room** – A location that can remain undisturbed for an extended period will be needed. That doesn't mean it can't be used for other purposes, but it is important to have a place where artefacts are displayed and not moved to keep a consistency of the gained knowledge. The best rooms will have plenty of white boards and cork boards. If possible, limit the amount of tables in the room. Chairs are OK, but removing barriers between participants opens up dialogue.
- **Notes** – Be prepared with all kinds of possible ways to do this. From large (poster size) notes to small sticky notes, to capture any and all the comments that are pertinent to the flow. In particular, consider starburst cards and colour sticky notes, to coordinate specific colours to specific activities. Then, these should be captured in a spreadsheet, where they can be used later for sorting and presenting. (However, we have found the best presentations take place in the room where the artefact gathering has been done.)
- **Photos** – Take pictures of all the artefacts (walls) every night as you leave. Not only is

this a way to “back up” your data, but it can be used in communication, reminder situations, and in recapping for executives.

### 5.1.4 Steps and flow:

The key in reviewing artefacts and steps in Step 2 (section 4.2) is to make sure everyone understands that the idea IS NOT to solve anything at this point. We are here to identify the current process, NOT solve it.

Now, granted, there will be times that the team will unilaterally come to a conclusion to solve an issue that is presently affecting work right then and there. However, for the most part, steer clear of those types of decisions. Otherwise, you'll end up trying to solve every issue. (From a sequence point, that could lead to back-and-forth changes and an extended timeline to the sessions.)

When there appears to be too much “energy” or a stalemate while discussing opposing views of a situation (which you'll have), simply put those items into a “Parking Lot” and move on. This lets the participants know that their issue won't be lost, and that it's being taken seriously.

Low-hanging fruit – You can't avoid this, and you don't want to. So, even though you aren't here to solve, there will be times when the group will insist and have a good reason for a change to be made immediately. Go with this – build on this positive energy. But, continue with your mantra of “not solving” anything as you go, during this step.

### 5.1.5 Optimise the process:

During this exercise, a common practice is to divide the artefacts horizontally along the wall, with the current flow separated from where the optimal flow will be (either above or below). Here are key points to address in this activity:

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- **Build on the low-hanging fruit** – If those are real winners, then use that to your advantage.
- **Identify redundancies** – Those might get marked with a particular starburst or sticky note with a unique colour, identifying the redundancy. Then, decide where the optimal time is, in the workflow, to accomplish that task.
- **Focus on the activities, not who is doing it** – You're not trying to eliminate positions, but optimise a process. Wait until it's over to figure out if there are adjustments to be made with personnel. That task is out of scope for now.
- **Focus on responsibility** – This goes along with the "where a task should be done." If multiple people are doing the same task, then there might be opportunities to note people's / departments' responsibility areas in a separate area.
- **Focus on accountability and disabling enablers** – This pertains to redundancies. Many times, team members tend to prefer "do-it-myself" even though they know the task belongs to someone else. They have a high degree of drive around the overall presentation of "their" product (or page, or catalogue). But, those people are sometimes then enabling the teammate who is not doing the work (on-time, or late, etc.), and actually covering for that person. That type of enabling simply allows unwanted behaviour to continue.
- **System integration opportunities** – Here's where the IT staff really earn their pay. They may sit quietly through most of the "Current Flow" exercises, but that doesn't mean they aren't taking notes and understanding a process they had no clue about before this.

### 5.1.6 Consider the software:

Although software may be the driver of the new process, it's important that it be looked at as a way to enhance an optimised workflow.

That way, even if the determination is to not buy the software, an enhanced workflow will still yield optimised results. That means, when optimising, there might be several forks in the flow that would indicate a more manual process at some steps.

### 5.1.7 Trust:

A by-product of this exercise will be trust, especially if facilitated correctly and the low-hanging fruit has paved the way.

### 5.1.8 Human resources:

HR's involvement is part of the leadership and communication process. However, the HR definition in this case also includes allowing key resources to be involved in a complex and highly time-critical process, while continuing to perform every-day duties.

- **Who** – When choosing front-line tactical decision-makers, it's important to NOT just include those that you know will be positive and eager to make change. But, it is important to bring different paradigms to the table (or no table as it may be). The key is finding those people that can handle the additional workload. What is the capacity that can be allowed by the business?
- **Project leadership** – This is usually the "Evangelist" of the process improvement, and typically a manager of an affected group. However, this person is definitely not the facilitator. This person will have money in the game and passion for the process change.
- **Project sponsorship** – This is usually a senior manager or director leading up through the Project Leadership channel. This person will be responsible for keeping the Executive board apprised of progress, challenges or obstacles, along with any eventual ROI determinations.
- **Project sequence** – Ideally, prior to the project, any other projects with possible dependencies will have been determined, therefore eliminating distractions and/or diversions into another priority.

## 6. Deliverables

At the end of tasks 2 and 3, a new workflow will have been developed in order to implement the PIM. In some cases, the implementation will include software, but it's not imperative. The new workflow will have a document that will need to be shared with all departments.

It's at this point that the software vendors should be brought to the Optimisation Room. There, you'll ask them to evaluate the flow, explain how their software will further optimise the process, and to provide a thorough proposal for their software's implementation. This is much like a visual RFQ.

Throughout the process, weekly updates should be carried out. At the end of each stage, the processes should be documented and sent out for review and an approval cycle.

Finally, the last deliverable will be the choice of the software vendor with the reasons, an ROI and a timeline of the Stages 4 and 5.

## 7. Conclusion

The increasing pressures placed on retailers by evolving technologies and user buying patterns is changing the way they manage their product information. Long gone are the days of independent departments producing their own information to a, typically, slow time-scale.

Now, organisations must work across the entire enterprise to deliver marketing communications that are consistent across all channels as well as being timely and localised. To achieve this requires a sophisticated PIM system that is capable of creating a single and definitive source of product information.

Typically, the implementation of such a system will embrace many departments with different criteria for success and requirements. Whilst this can appear daunting, success can be achieved if approached in the right way, taking full account of the people involved and the critical processes.

Hopefully, this white paper has helped to overcome some of the concerns you may have with regard to implementing a PIM. But, if you have any questions, please do not hesitate to get in touch.



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