

## Ignition Guide to Communicating the Rightsizing Decision

### This guide will help you:

- Prepare resources for leaders to communicate the rightsizing decision.
- Manage employee reactions and survivor engagement effectively.

<b>Time*:</b>	4-5 weeks
<b>Effort**:</b>	1-2 FTEs (will vary according to organization size and dispersion)
<b>Inputs:</b>	<ul style="list-style-type: none"><li>▪ List of all the employees in each business unit</li><li>▪ Work locations of all impacted employees</li><li>▪ Quantitative and qualitative performance data of the affected employees</li></ul>

<sup>1</sup> \*Time refers to the total duration for completing the activity end-to-end.

<sup>2</sup> \*\*Effort refers to the total number of FTEs required to execute the activity.

<sup>3</sup> **Essential** Steps marked as Essential have been identified as critical for the successful execution of this project.

<sup>4</sup> Disclaimer: Please note because there are many items in the Ignition Guide, you will see this disclaimer only once, but it is intended to apply to all items in the guide. Unless otherwise set forth in your Service Description or marked expressly for external use, these items may be downloaded and customized for internal noncommercial use by the Client. The items may not be repackaged or resold. Gartner makes no representations or warranties as to the suitability of these items for any particular purpose, and disclaims all liability for any damage or loss, whether direct, consequential, incidental or special, arising out of the use of or inability to use this material or the information provided herein.

# Overview

## Plan

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1. Plan to communicate the rightsizing decision.

## Build

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2. Prepare resources to communicate the rightsizing decision.
3. Enable leaders to communicate the rightsizing decision to employees.
4. Provide change management resources and tactics to leaders.

## Monitor

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5. Monitor the communication strategy.

# Step 1 of 5: Plan to Communicate the Rightsizing Decision

Lay the groundwork for communicating the rightsizing decision and ensure all participants understand their responsibilities, timelines and outcomes.

## Project Outcomes

- Communication plan and tools that enable leaders to communicate the rightsizing decision to employees.
- Survivors are engaged throughout the process.
- Clear ownership of the activities in the rightsizing communication process.

## Problems Addressed

- Inconsistent messaging since leaders are not equipped with the right information to communicate effectively.
- Lack of clear ownership among different activity owners (e.g., HR team, business leaders) impacts the efficiency during the communication process.
- The communication strategy doesn't cater to the needs of different employee segments, making it difficult to engage them during change.

## Roles and Responsibilities

### HRBPs

- Understand the rationale and strategy behind the rightsizing decision.
- Initiate conversations with business leaders and HR leaders to prepare the communication strategy.
- Conduct sessions with leaders to drive the communication plan.
- Provide change management support to leaders.

### CHRO

- Approve the rightsizing communication strategy to be used by the leaders.

### Employees (Affected and survivors)

- Express concerns with the rightsizing decision or process through the right channels (e.g., managers, HR)

### Business or Line Leaders

- Proactively communicate with employees to address their concerns.

### Communication Team

- Ensure the right communication channels and methods are used to communicate the rightsizing decision.

## Legal

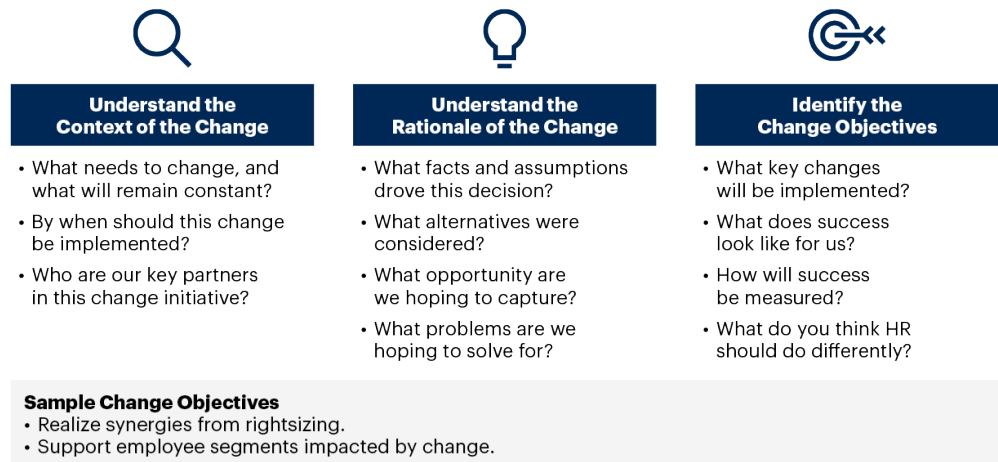
- Create severance packages with HR.
- Determine the potential risk of rightsizing and communicate it to HR.

## Before You Start

1. Understand the need and context for the rightsizing decision.

Figure 1: Sample Questions to Understand the Change and Desired Outcome

### Sample Questions to Understand the Change and Desired Outcome



Source: Gartner (March 2019)

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2. Understand the criteria and process followed to lay off the affected employees.

3. Familiarize yourself with the terms used in this Ignition Guide:

**Affected Employees** — Employees (e.g., full-time, part-time, contractual) who are being laid off as a part of the rightsizing decision

**Survivors** — Employees who are retained and affected by the layoffs occurring in their teams/network

## **Common Pitfalls and Keys to Success**

### **✘ One-way communication leads to speculations**

The rightsizing communication delivered in the form of announcements to employees and managers hardly encourages two-way, open communication. This leads to speculations and rumors that have a negative impact on employee morale and reputation of the organization as an employer.

### **✘ Leaders are not equipped to deliver the messages and handle backlash**

Organizations focus more on delivering the news during a rightsizing phase and less on training managers to deal with reactions and responses of the affected employees and survivors once the news has been delivered.

### **✘ Organizations rush into communicating change**

HR is overwhelmed during the process with the amount of work they need to get through and end up rushing into communicating and implementing the changes. As a result, employees do not get adequate time to accept and adjust to the change.

### **✔ Establish open communication channels**

Communicate the rightsizing decision to survivors and laid-off employees in a way that allows employees to express fears and concerns. To clarify doubts that employees have, be transparent in educating employees about the layoff criteria.

### **✔ Train leaders to manage layoff conversations effectively**

Train leaders on conducting difficult conversations during the rightsizing process. It is critical for leaders to learn how to deal with employee reactions in a sensitive manner.

### **✔ Define clear ownership of rightsizing activities**

Define clear roles and responsibilities for each activity in the rightsizing process. This will allow HR teams to devote their time to employees to explain the rationale behind the change and address their concerns. This will also ensure the survivors are continuously engaged and the reactions of laid-off employees don't impact their surviving peers.

### **Communicating rightsizing decisions at scale**

A one-size-fits-all communication plan designed to communicate the rightsizing decision to employees overlooks the specific needs of different employee segments.

### **Tailor change management efforts for different employee segments**

Identify the change barriers faced by different employee segments at different stages of the change, and create a change management plan for each segment accordingly.

## Step 2 of 5: Prepare Resources to Communicate the Rightsizing Decision

Prepare for communicating the rightsizing decision by clarifying roles and responsibilities, understanding the audience and creating the communication content required.

### Tasks

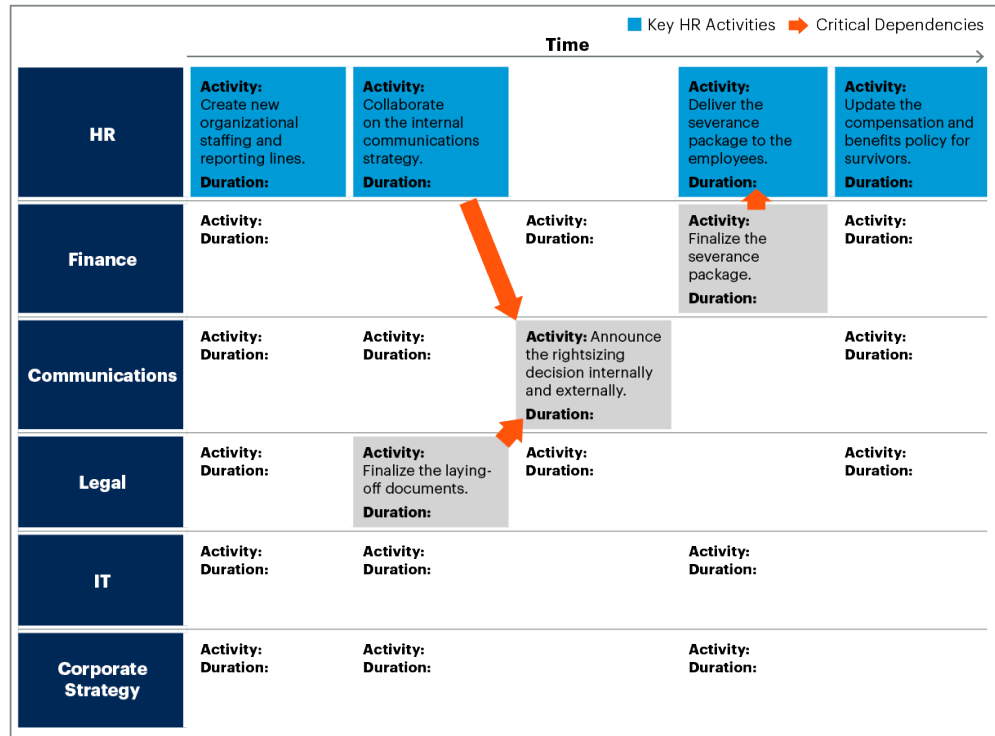
#### 2.1

Clarify roles and responsibilities with activity-owners. **Essential**

Identify key stakeholder groups (e.g., legal, recruiting, finance, administration) as activity-owners in the rightsizing communication exercise, and clarify roles, responsibilities and associated timelines for each activity.

Figure 2: Clarifying Roles and Responsibilities

**Clarifying Roles and Responsibilities**  
Illustrative



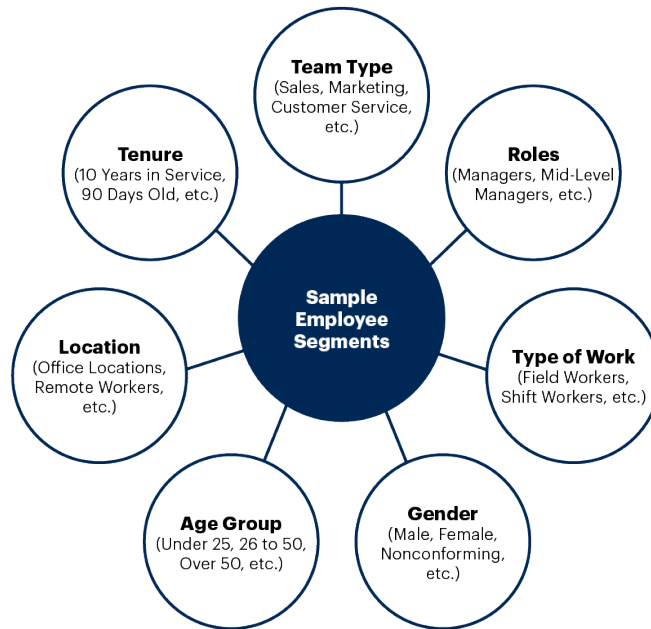
2.2

Employee Segmentation Tool (.xls)

Develop an understanding of the target Audience to prepare an effective communication plan.

Segment the affected employees into different groups (by demographic factors such as role, tenure, department, age, employment type) to outline a communication plan most suited for each segment.

Figure 3: Different Employee Segments

**Different Employee Segments**

Source: Gartner (March 2019)

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**2.3**

 Guide to Create Change Communication Content (.doc)

Prepare a communication strategy for leaders.

Create communication content such as checklists, tools and presentation templates for the leaders, and finalize channels to communicate decisions to employees.

## How to Set Up for Success

**Success Criterion**

A clearly prepared communication plan aligned to employee expectations.

**Red Flag**

Lack of accountability among stakeholders regarding roles and responsibilities.

## Step 3 of 5: Enable Leaders to Communicate the Rightsizing Decision to Employees

Train leaders on communicating the rightsizing decision effectively and provide continuous support to them.

### Tasks

#### 3.1

Equip leaders to conduct rightsizing conversations.

Essential

Conduct one-on-one sessions with leaders on communicating the rightsizing decision to employees. Help leaders understand and internalize communication material and checklists for the communication plan. Train managers of the affected employees to anticipate and respond to employee reactions with a role-playing exercise.

#### Table 1: Dos and Don'ts of Communicating the Rightsizing Decision

##### Dos and Don'ts of Communicating the Rightsizing Decision

###### Examples of what NOT to say:

- "I'm sorry this has happened to you."
- "This wasn't my decision." / "If it was up to me, you would still be here."
- "I want you to know how hard this decision was ..."
- "It seems unfair." / "You just got the short end of the stick."
- "This is hard for me too."
- "You'll be OK."
- "Let me know if there is anything I can do."
- Anything about personal circumstances, family situation, etc.

###### Examples of appropriate empathetic responses:

- "I realize this is a lot to absorb."
- "I understand you may be upset."

###### Examples of redirecting or closing the conversation:

- "This decision has been made after a lot of consideration and unfortunately, there is nothing we can do to change it."

## Dos and Don'ts of Communicating the Rightsizing Decision

- “After you have had time to read through the specifics and absorb the news, you can direct any additional questions to your HR representative or to me. The HR representatives will hold office hours next week.”

### Our Advice

*While communicating the rightsizing decisions, advise leaders to use this opportunity to let affected employees know of the realignment opportunities available to them across other parts of the organization (if available). Partner with L&D to create trainings to reskill affected employees so they are able to find new opportunities internally or externally.*

## 3.2

### Provide ongoing support to leaders.

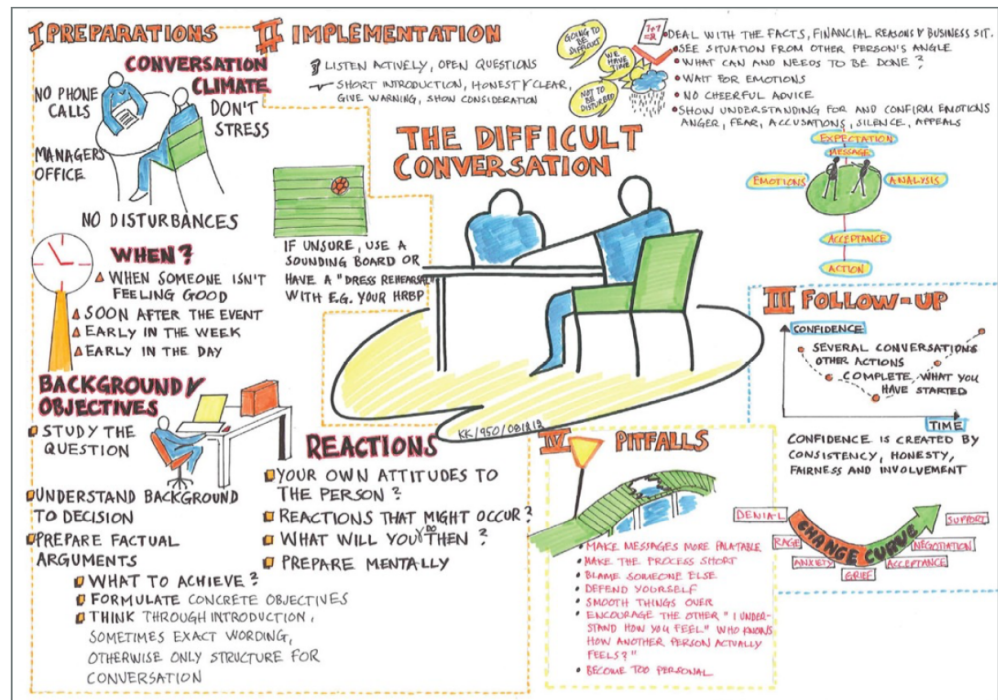
Oversee initial conversations between leaders and employees to facilitate a smooth conversation. Discuss any special cases with leaders that come up while communicating the rightsizing decision.

### Our Advice

- *Advise leaders that they need to acknowledge these are potentially emotional discussions, and the best way for them to mentally prepare themselves for emotional or difficult discussions is to try to anticipate how the individuals they work with will respond and what questions they will have.*
- *Equip leaders to handle difficult conversations with a four-step process from Melcrum, which created a graphic checklist to remind leaders of how they need to adapt their communication style in uncertain situations.*

Figure 4: Visual Guide for Handling Difficult Conversations

### Visual Guide for Handling Difficult Conversations



Source: Melcrum

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## How to Set Up for Success



### Success Criterion

- Leaders are able to successfully execute the communication plan without any major setbacks.



### Red Flags

- Leaders are unclear about their roles in the communication process.
- Leaders feel unprepared to have rightsizing conversations within their teams and are unable to manage employee reactions after having these conversations.

## Step 4 of 5: Provide Change Management Resources and Tactics to Leaders

Prepare a plan to review talent management strategy and continuously engage survivors.

### Tasks

#### 4.1

Review the talent management policies and reintroduce the organization's culture.

After communicating the rightsizing decisions, revisit the talent management policies considering the changes and reintroduce organization's culture. Make a list of EVP drivers or cultural factors that need to be emphasized to help employees accept and support the change.



#### Our Advice

*Revisit policies and processes to ensure the organization's culture is emphasized to the employees. Emphasize key cultural strengths and ensure talent management processes reflect the revised culture of the organization at various employee and candidate touchpoints.*

#### 4.2

Create open channels for discussing the rightsizing decision and criteria.

Based on the specific needs of each employee segment, identify a mix of platforms to conduct rightsizing conversations. Communicate honestly and transparently about the process and criteria for selecting the affected employees. Frequently encourage direct reports to discuss organizational changes and concerns with leaders.

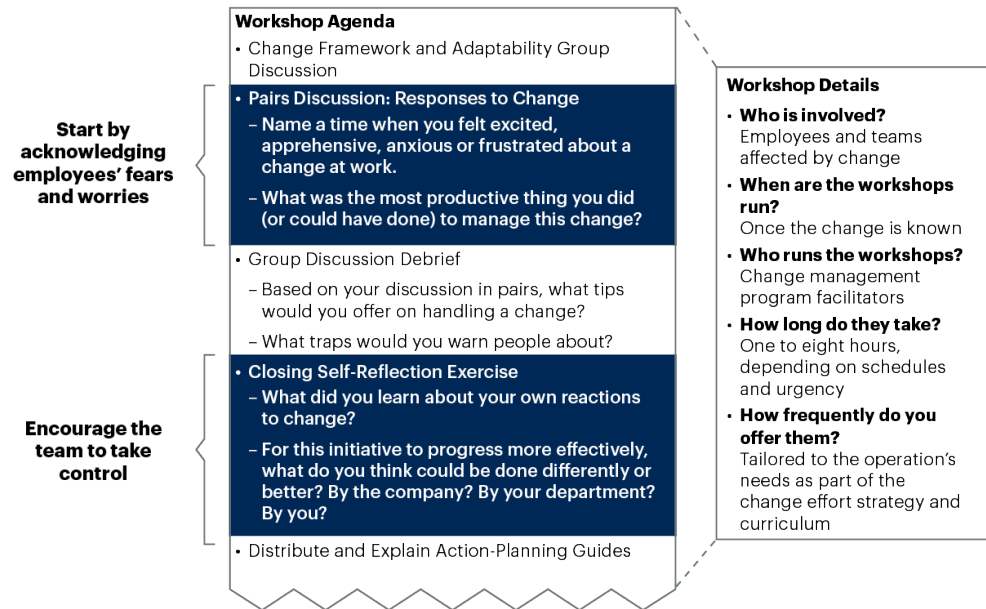


#### Our Advice

*To understand employee concerns at large and to address them using consistent messaging, prepare a repository of questions asked by employees during rightsizing conversations and share it with leaders to enable them to address employee concerns.*

Figure 5: Change Reaction Workshop Agenda

### Change Reaction Workshop Agenda



Source: Gartner (March 2019)  
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## 4.3

Help leaders reconnect survivors to the organization.

Essential

As soon as you have the relevant information, articulate organizational goals and strategy to survivors, and explain how their role and responsibilities contribute to achieving organizational or business unit goals.



### Our Advice

*Leaders should make an effort to call employees to check in with them, increase the frequency of team meetings and one-on-ones with team members, and ensure they maintain an open-door policy. Leaders must share as much information as possible with their direct reports about the changes in the organization and its future direction, and emphasize the value of innovation and flexibility at their organization among other organizational values.*

Figure 6: Re-Engaging Survivors

**Re-Engaging Survivors**

## Survivor's Syndrome

**Symptoms Include**

- Lower motivation and morale
- Reduced loyalty
- Lower trust and increased skepticism
- Feelings of guilt

**Resulting In**

- Lower productivity levels
- Increased absences
- High labor turnover

**Tip:** Re-engage survivors by reassuring and informing them on the business rationale behind the displacements.

Source: Gartner (March 2019)

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## How to Set Up for Success

**Success Criterion**

- Employees understand the rationale behind rightsizing and adapt well to the change.

**Red Flags**

- Employees reporting that the culture of the organization is not open to express concerns through feedback to managers, in employee engagement surveys, etc.
- High attrition among survivors post-rightsizing, along with departing employees highlighting rightsizing-related factors (e.g., poor culture, ineffective change management practices) as their reasons to leave in exit interviews.

# Step 5 of 5: Monitor the Communication Strategy

Ensure the communication strategy maintains a high level of consistency across the organization and continuously engages the survivors.

## Review Your Performance

 Ignition Project Reviewer (.xls)

- Regularly gather feedback from employees on the communication strategy through employee engagement surveys, exit interviews, etc.
- Continuously check the relevance of the communication plan in light of changing organizational goals.

## Keys to Continued Success

### Regularly Update the Communication Strategy to Keep Survivors Engaged

Frequently update communication and messaging to make sure they are relevant to engaging the survivors.

### Constantly Follow Up With Leaders to Address Employee Concerns

Ensure leaders are constantly speaking to employees to keep them updated on the changes that are happening in the organization, and resolve employee concerns along the way.

## Recommended by the Authors

- [“Ignition Guide to Building a Change Communication Plan”](#)  
This guide will help you identify the change adoption barriers for different employee segments, develop messages that are intuitive and relevant to employees and address employee concerns pertaining to the change.

- **“How HRBPs Should Help Their Leaders Better Manage Change”**  
Under increased pressure, leaders are charged with setting change strategy and ensuring change implementation is successful. HRBPs and HR generalists have three opportunities to form partnerships with line leaders and help them better manage change.