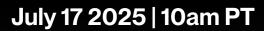


With Nellie Wartoft
CEO & Founder, Tigerhall



# **Automating Change Management Workflows**

Free Up Time for What's Truly Human



### Classic Change Management Workflows





### Classic Change Management Workflows

#### **Manual Workflow**



**22-55 weeks** 2-10 people

Average 297 man hour weeks

6 years x 1 FTE x average FTE cost \$100k per annum

\$600,000 per initiative launch



### Poll: Where do you spend most of your time today?

Select the area where you currently spend the majority of your change management hours.

A Stakeholder Management

**B** Communications

**C** Training

Reporting

Other

Poll active | Results will display in real-time

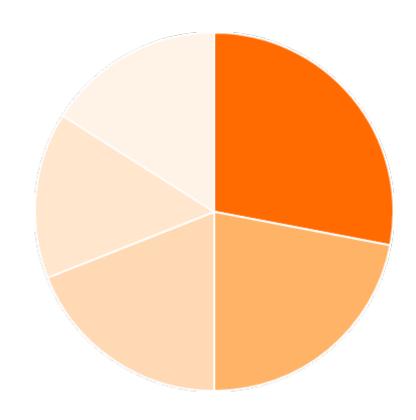


### Where Time Goes

Change management professionals spend most of their time on manual, repetitive tasks that could be automated:

<ul> <li>Communications drafting</li> </ul>	28%
<ul><li>Stakeholder updates</li></ul>	22%
<ul><li>Data consolidation &amp; reporting</li></ul>	19%
<ul> <li>Training asset creation</li> </ul>	
<ul><li>Project admin</li></ul>	

That's **70%** of time spent on tasks that could be partially or fully automated.





### What We're Solving For

"The goal isn't to remove what's **human**—it's to spend more time **being human**."

- **Solution** Before: Busywork-Heavy
- Manual data gathering and reporting
- Repetitive communications creation
- Time-consuming stakeholder updates
- Generic, one-size-fits-all training
- Disconnected change activities

- After: Human-Led Interaction
- Focus on strategy and empathy
- Deeper stakeholder engagement
- Real-time insights and course correction
- Targeted, relevant experiences
- Connected, integrated transformation



### But First: Remove, Automate, Enhance

### Which workflows to:



### Remove entirely

Eliminate processes that add no value or are unnecessary obstacles



#### Automate

Apply technology to repetitive tasks with standardized inputs and outputs



### Make more human

Enhance interactions that benefit from personal touch and emotional intelligence

"Not everything needs automation. First decide if it should exist at all, then determine if it requires human judgment."



### Today's Agenda

- 1 Stakeholder Management
  Automate updates and insights from exec interactions
- Change Communications
  Draft and personalize comms in seconds
- Training & Support
  Turn content into training—instantly
- Just-in-Time Delivery
  Deliver change at the moment of action
- Analysis & Reporting
  Automate insights across the change journey
- Red Flags & Pitfalls
  Avoid common traps when scaling automation
- 7 Getting Started
  Practical steps to begin your automation journey







**SECTION 1** 

# Stakeholder Management

Use AI to track, summarize, and proactively engage stakeholders – freeing up hours of manual meeting prep and follow-ups.





PROBLEM

### **Stakeholder Management**

### **Manual Touchpoints**

Individual 1:1 updates with stakeholders consuming valuable time and resources

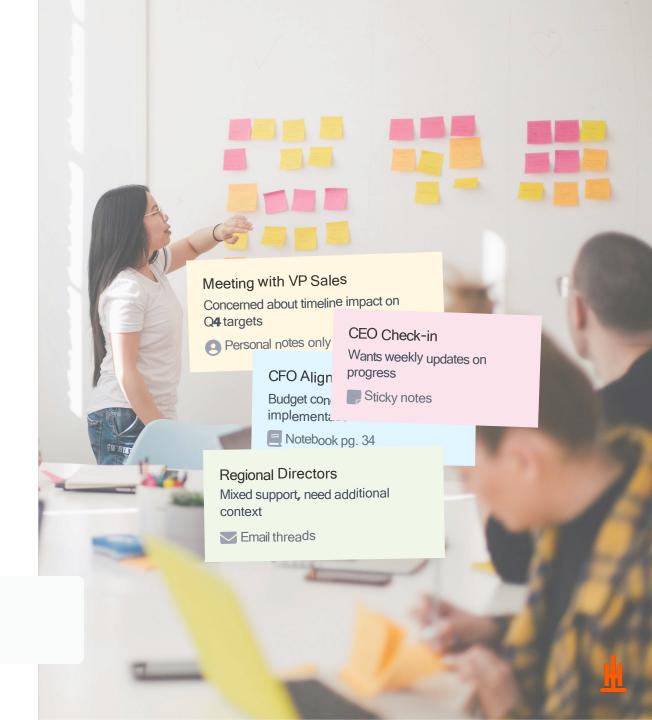
### Duplicated Effort

Same information communicated repeatedly across different stakeholder groups

### Scattered Information

Executive touchpoints recorded in notebooks and private notes, not in systems

"We have all this stakeholder information, but it's trapped in meeting notes, emails, and our heads."



#### **AUTOMATION TACTICS**

### **Stakeholder Management Automation**

### Transcribe & Summarize

Convert meeting recordings into searchable text and executive summaries automatically

### ① Impact Assessment

Generate stakeholder impact maps and alignment scores from meeting transcripts

### Follow-up Generation

Auto-create targeted questions based on sentiment analysis and knowledge gaps

### **Tracking** Tracking

Example: ChatGPT "Projects" for stakeholder tracking and mapping across initiatives

#### **Automation Flow**

### Record Stakeholder Meeting

Capture audio/video of key discussions



### Al Processing

Transcription, sentiment analysis, key point extraction



#### **Output Generation**

Summaries, action items, alignment scores



Focus on relationships and strategic decisions



**REAL CASE** 

### **Stakeholder Management Automation**

### CRO in a Go-to-Market Overhaul

Reducing stakeholder management time by 65% while improving alignment



#### 3 Stakeholder Recordings

- Exec meetings, team discussions, customer feedback

- 20-minute customer feedback compilation

### **(→** Output

### Impact Map

Visualized key dependencies and risks

#### Alignment Report

Highlighted gaps and priorities across teams

#### **Content Needs Assessment**

Auto-generated training and communication priorities





SECTION 2

# **Change Communications**

Automate the drafting and personalization of change comms, tailored by role, function, or location, including executive messaging.





**PROBLEM** 

### **Change Communications**

### 1

### **Mass Communications**

One-size-fits-all messages that fail to resonate with specific audiences or roles



### **Irrelevant Emails**

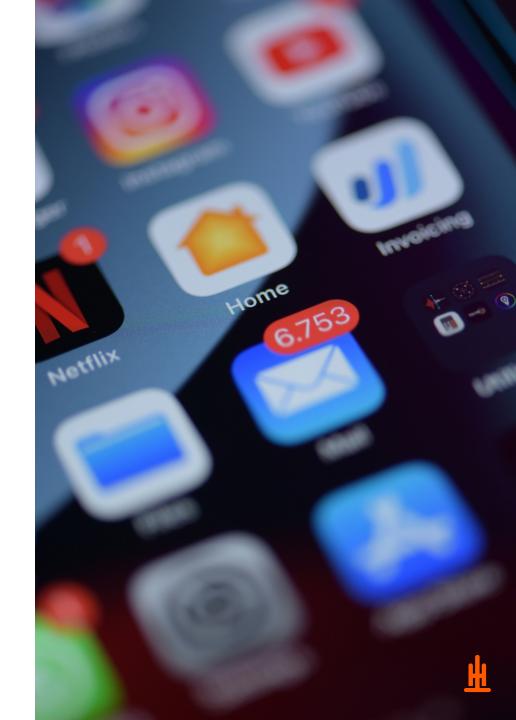
Generic templates leading to low open rates and even lower engagement



### **Siloed Executive Comms**

Leadership messages created in isolation, disconnected from broader change narrative

**Result:** Low engagement, inconsistent messaging, and wasted time drafting ineffective communications



#### **AUTOMATION TACTICS**

### **Change Communications**



#### **Create from source documents**

Auto-generate communications from meeting notes, strategy decks, and policy documents



### Auto-personalize by segment

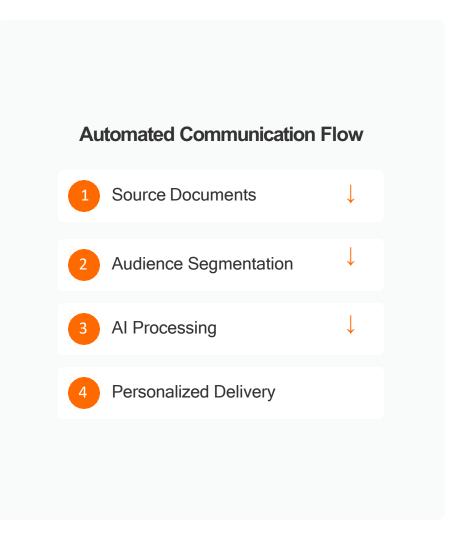
Tailor messages per audience segment based on function, location, tenure, and needs



### Leverage executive voice

Train AI models to emulate executive communication style and tone for consistent messaging

Switch from manual templates to Al-assisted personalization to increase message relevance by 83%





**REAL CASE** 

### **Change Communications**

### **Strategic Change to Personalized Communications**

Transforming a single change deck into audience-specific campaigns that increased engagement by 48%

#### **→**) Input

#### **Change Management Deck**

- Standard corporate transformation slide deck
- 42-slide strategic transformation overview
- Technical jargon and complex data
- One-size-fits-all messaging

#### ★ Tools Used

- Al for content transformation
- Internal vocabulary & terminology base
- Behavioral engagement data

### C→ Output: Personalized Campaigns

### Frontline Operations

Short, action-focused procedural guidance

Practical how-tos Video demos

#### **Finance Department**

Data-rich, ROI and compliance focused

Metrics focus Technical detail

#### Executive Leadership

Strategic overview, market context, bottom line

Big picture KPI summary



**SECTION 3** 

# **Training & Support**

Rapidly generate training materials and support assets from objectives, meetings, or existing documentation—no LMS bottlenecks required.





**PROBLEM** 

### **Training & Support**

### Outdated LMS Modules

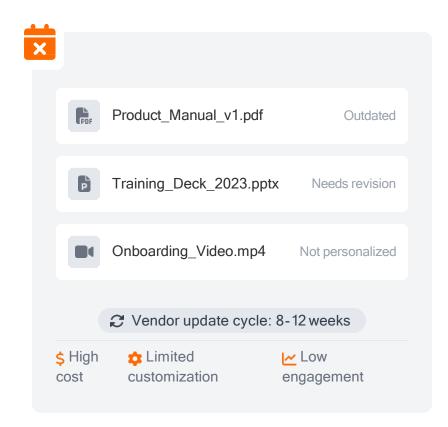
Learning platforms that don't adapt to modern learning needs or integrate with current workflows, creating static, one-size-fits-all training experiences.

### • Time-consuming PDF Creation

Hours spent designing, formatting, and maintaining PDF guides that quickly become outdated and don't allow for interactive learning experiences.

#### **Vendor Reliance**

Dependency on external vendors for content creation leads to delays, budget overruns, and materials that don't perfectly match organizational needs.





**AUTOMATION TACTICS** 

### **Training & Support**



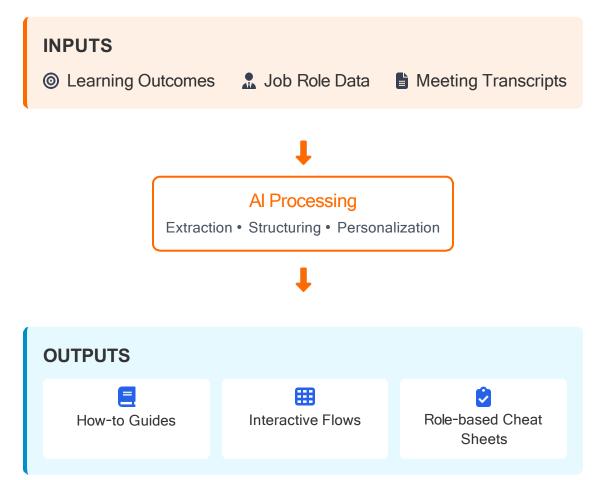
Transform learning outcomes and job roles directly into role-specific training assets with Al

### Transcript Conversion

Automatically convert meeting transcripts into structured support guides and quick-reference materials

### Vendor Meeting Extraction

Extract technical knowledge and workflows from vendor sessions to build customized training





REAL CASE

### **Training & Support**

### **ERP Rollout for Global Finance Team**

Converting vendor meetings into comprehensive training materials in 75% less time

(→ Output → Input 12 Role-Specific How-To Guides **ERP Vendor Meeting**  $\Box$ Tailored for different user types and workflows One 90-minute system demonstration **4 Interactive Process Flows** System demonstration recording Decision-tree based guidance for common tasks ✓ Vendor documentation PDF (220 pages) **Role-Based Cheat Sheets** Q&A session transcript One-page reference guides for 6 different team roles 8 Micro-Learning Videos 2-3 minute task-specific tutorials



**SECTION 4** 

# **Just-in-Time Delivery**

Trigger the right enablement content exactly when people need it, based on workflow actions in systems like CRM or ERP.





**PROBLEM** 

### **Just-in-Time Delivery**

#### **Static Communications**

Information sent long before people need it

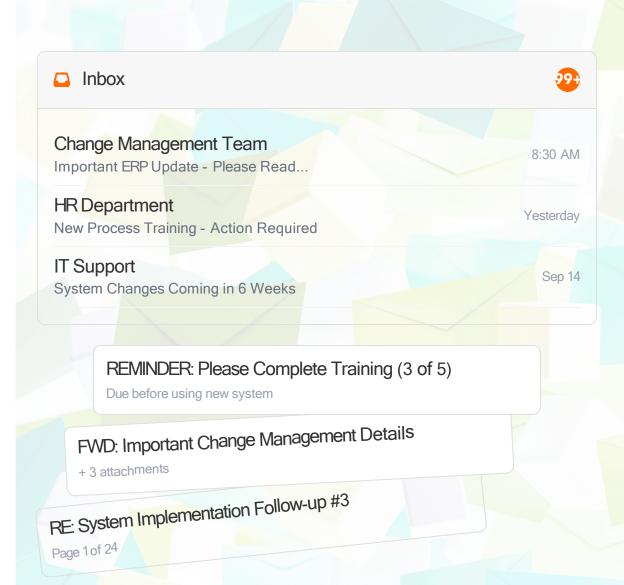
- Sent according to project timeline, not user readiness
- Solution Forgotten by the time action is needed

#### **Information Overload**

When everything is important, nothing is

- Long emails with too much information at once
- Users tuning out due to cognitive overload
- Critical details buried in paragraphs of text

"When communications aren't timely and relevant, they become noise—not signal."





#### **AUOTMATION TACTICS**

### **Just-in-Time Delivery**

### **₩** Integrate into workflows

Embed change content directly into existing systems like CRM and ERP platforms where employees are already working.

### **★** Trigger micro-content at moment of action

Deliver bite-sized information precisely when users need it, based on their system actions or workflow stages.

#### **Example:**

Seller moves deal stage → Auto-prompt on pricing changes



Just-in-Time Prompt
New pricing guidelines apply to this deal





REAL CASE

### **Just-in-Time Delivery**

### **ERP System Purchase Order Process**

Increasing compliance by 42% with contextual micro-reminders

### → Traditional Approach



### **Bulk Approval Training**

Delivered weeks before go-live

- 60-minute training sessions that users forgot
- PDF guides buried in SharePoint
- ♠ High error rate in new approval flow

#### (→ Just-in-Time Solution



#### **Contextual Micro-Reminders**

Delivered in the moment of action

New PO Request Detected

Remember: Approval threshold has changed to \$5,000. Orders above this amount require director-level approval.



Information delivered when needed

42% Compliance Increase

Correct approvals from day one



SECTION 5

# **Analysis & Reporting**

Connect data across change workflows to automate reporting, track sentiment, and make smarter, faster decisions.







### **Analysis & Reporting**

### **Manual Surveys**



Time-consuming creation, distribution, and analysis with low response rates

#### **Siloed Data**

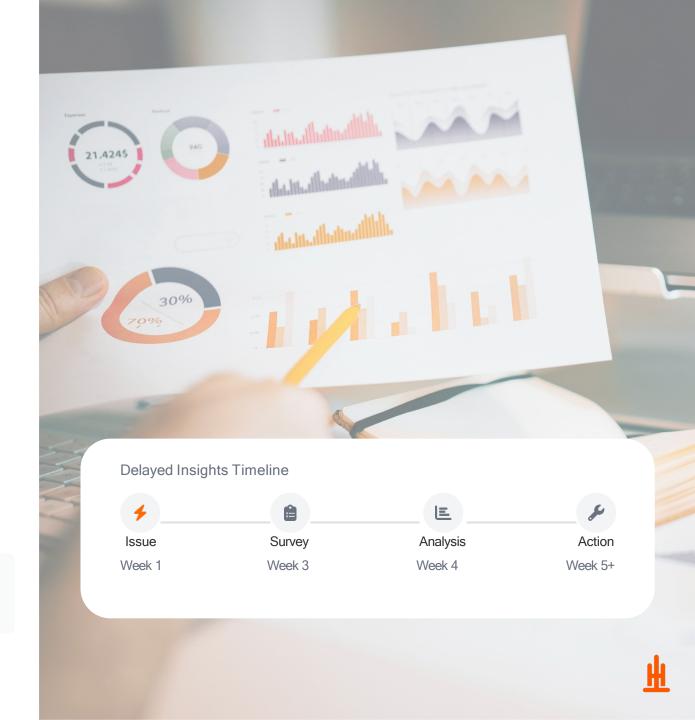


Isolated information across systems, departments, and stakeholder groups

### Lagging Indicators

Insights arrive too late to course-correct effectively

"By the time we know there's an issue, it's already become a significant problem."



**AUTOMATION TACTICS** 

### **Analysis & Reporting**



#### **Vertical Integration**

Track engagement, content consumption, feedback and sentiment in one place



#### **Auto-Generated Dashboards**

Real-time data visualization and sentiment summaries without manual input



#### **MCP Servers**

Secure and standardized communication between Al models and external resources

"When your data is connected, you can spot patterns across functions and respond in hours, not weeks."







### **Analysis & Reporting**

### **Connected Reporting Across Functions**

Identifying and course-correcting negative sentiment within 24 hours

→ Integrated Data Sources

#### **Cross-Functional Data**

Unified view across teams and channels

Pulse surveys & sentiment tracking

■ Leadership communication engagement metrics

Real-time feedback channels

**f**→ 24-Hour Course Correction

Alert Triggered
System detected 32% drop in sentiment following leadership update

4:00 PM

Auto-Analysis

8:00 AM

Al identified key concerns around timeline and role changes

Next Day

Targeted Response

Personalized clarifications sent to affected teams

**Recovery Confirmed** 

Sentiment returned to baseline within 24 hours





### Poll: Where would you start automating first?

- Based on what you've learned today, which workflow would you prioritize for automation?
- A Stakeholder Management
- **B** Communications Drafting & Personalization
- C Training & Support Content Creation
- Just-in-Time Delivery
- Analysis & Reporting



SECTION 6

# Red Flags & Pitfalls

Avoid the biggest mistakes in automating change—like siloed point solutions, poor data access, and automating chaos instead of streamlining it.





### What to Look Out For



### **Vertically integrated system**

Avoid creating a "Frankenstack" of disconnected tools. Choose solutions that work together seamlessly.



### **IT** collaboration

Secure early buy-in for integrations and access to backend systems. Work with IT as partners, not gatekeepers.



### Don't automate chaos

Streamline and simplify your processes first. Automating inefficient workflows only makes bad processes run faster.



SECTION 7

## **Getting Started**

Practical steps to begin applying automation in your change management work—without waiting for perfect conditions.





### Your 3 Starting Points

- Choose one repetitive workflow you hate
  Focus on a high-volume process with predictable steps and clear output requirements.
- Figure out access to data lakes

  Ensure you get access to the data you are allowed to access, and learn what you don't know you don't know
- Connect two data sources

  Even loose connections between systems will yield immediate benefits—
  perfect integration can come later.

### **Pro Tips:**

- Aim for quick wins that save at least 5 hours per week
- Document your baseline metrics before starting
- Involve a technical collaborator early



### Tools Landscape



### **ChatGPT Projects**

Al assistant for content creation, stakeholder tracking, and summaries

**Content Generation** 

**Meeting Summaries** 



### Zapier

Connect apps and automate workflows without coding

3000+ App Integrations

Workflow Automation



### **Slack Integrations**

Deliver change communications in existing workflows

In-workflow Delivery

**Automated Updates** 



### Tigerhall

Fully integrated change activation platform built for personalized activation at scale

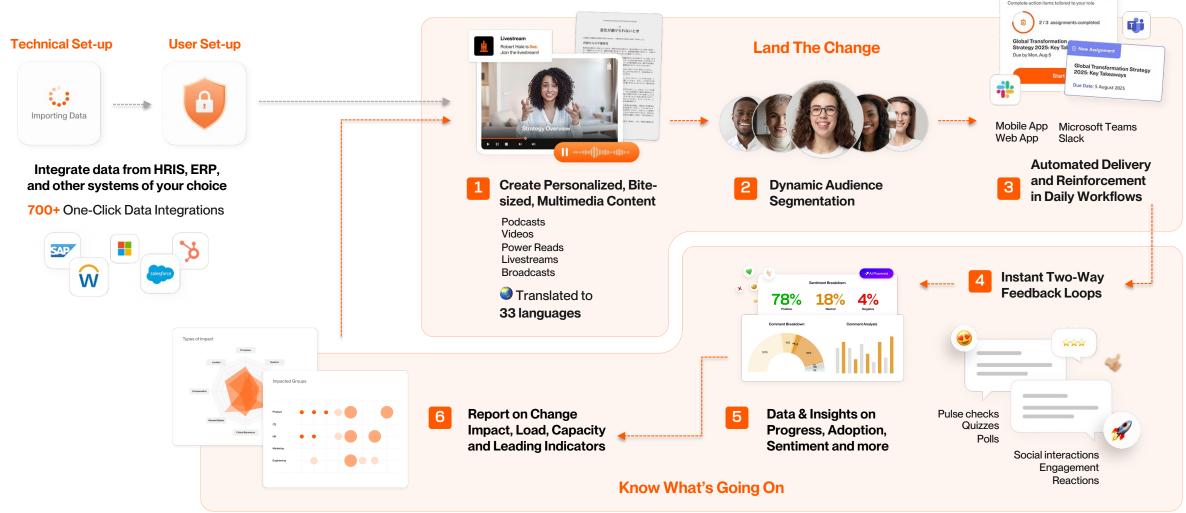
Al-powered

**Vertical Automation** 

End-to-End Solution



### **How Tigerhall Works**





Your Change Journey

### The Tigerhall Difference

	Before Tigerhall	After Tigerhall
Time to Launch	Months	Days ↓
Workload	High, Manual	Low, Automated ↓
External Services Spend	\$1-12M	\$50k-1M ↓
FTEs Required	10-20	<b>2</b> ↓
Organizational Engagement	7%	<b>78%</b> ↑
Insights	Annual Surveys	24/7 Insights
Sustainability	Ad-Hoc Projects	Always-On System



### What Success Looks Like

**Launch Times** 

90% Faster

Average reduction in transformation implementation time

**Time Saved on Content Creation** 

80%+

Through automated content creation and personalization

#### **Stakeholder Visibility**

85% Increase

Improvement in leadership visibility into change adoption

Companies using automation report 3x higher change adoption rates



### Recap: 5 Workflows, 3 Pitfalls, 3 Starting Steps

### **5 Key Workflows to Automate:**

- 1 Stakeholder Management
- 3 Training & Support Content Creation
- 6 Analysis & Reporting

- 2 Communications Drafting & Personalization
- Just-in-Time Delivery Triggers

### 3 Pitfalls to Avoid:

- Frankenstacks of disconnected tools
- Automating chaos without streamlining first
- Neglecting IT collaboration for integration

### 3 Starting Steps:

- Choose one repetitive workflow
- Use the Al you already have
- Connect data sources even loosely at first

"Automate the work, so you can focus on the people"

### Open Q&A



Now is your chance to ask questions about automating your change management workflows.



### Speak Up

Raise your hand or unmute yourself to ask your question directly



#### **Use the Chat**

Type your questions in the chat panel and we'll address them in order



#### **Submit Later**

Email follow-up questions that we don't have time to address today

#### **Common Areas of Interest:**

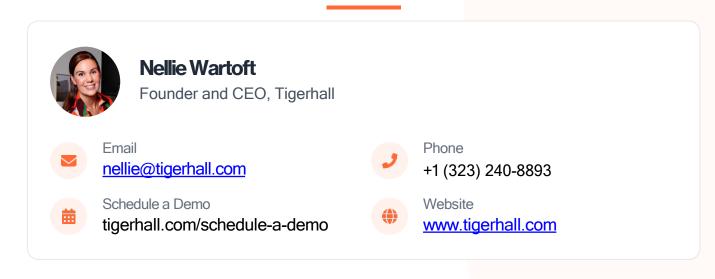
- > Tool selection & integration
- Measuring automation ROI
- > Implementation timelines

- Getting stakeholder buy-in
- Change management team skills
- Security & compliance concerns



## **THANK YOU**

### Ready to Automate Your Change Approach?



**Connect with Tigerhall** 





Download today's presentation materials at: tigerhall.com/resources

