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APMP WRC

The Power of Effective Change Management

Why the best ideas fail without the *human* side of transformation



By: Amy-Louise Tracey



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SHOW OF HANDS

Who has launched a change that didn't stick?

A tool. A process. An AI pilot. Keep your hand up if it was more than once.

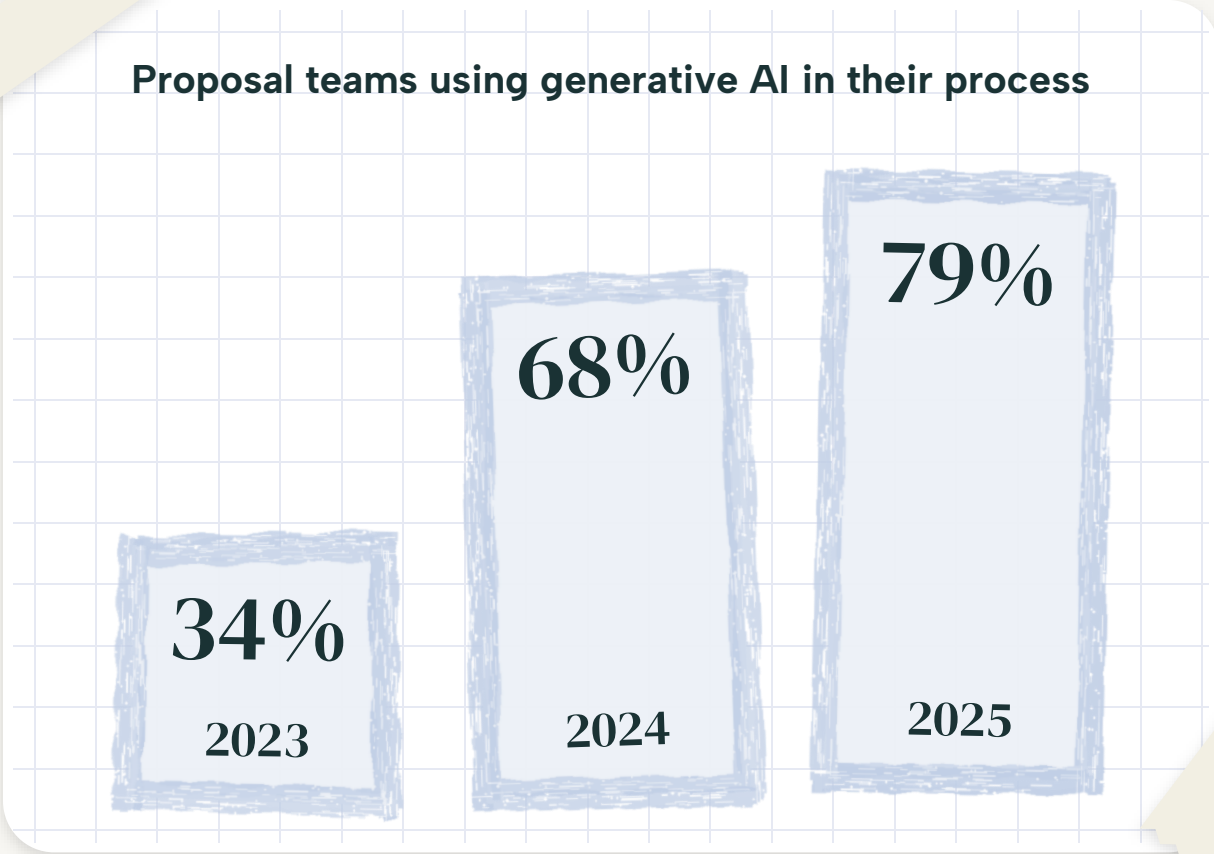


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WHY NOW

Change is part of the job now

In three years, use of AI has almost tripled. Evaluators now use digital scoring tools, and expect faster, more personalized responses.



Source: Loopio RFP Trends & Benchmarks Report

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THE HARD TRUTH

Most change fails

70%

of corporate change efforts fail, per the widely cited Harvard Business Review figure from 2000

31%

of major IT projects are entirely successful, per the Standish Group

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THE HUMAN FACTORS

Why change is hard

~2

Months to form a habit

Not 21 days. And that's one person, not a whole team.

Organizational baggage

Systems, unwritten rules, outdated tech. Touch one thing and something else breaks.

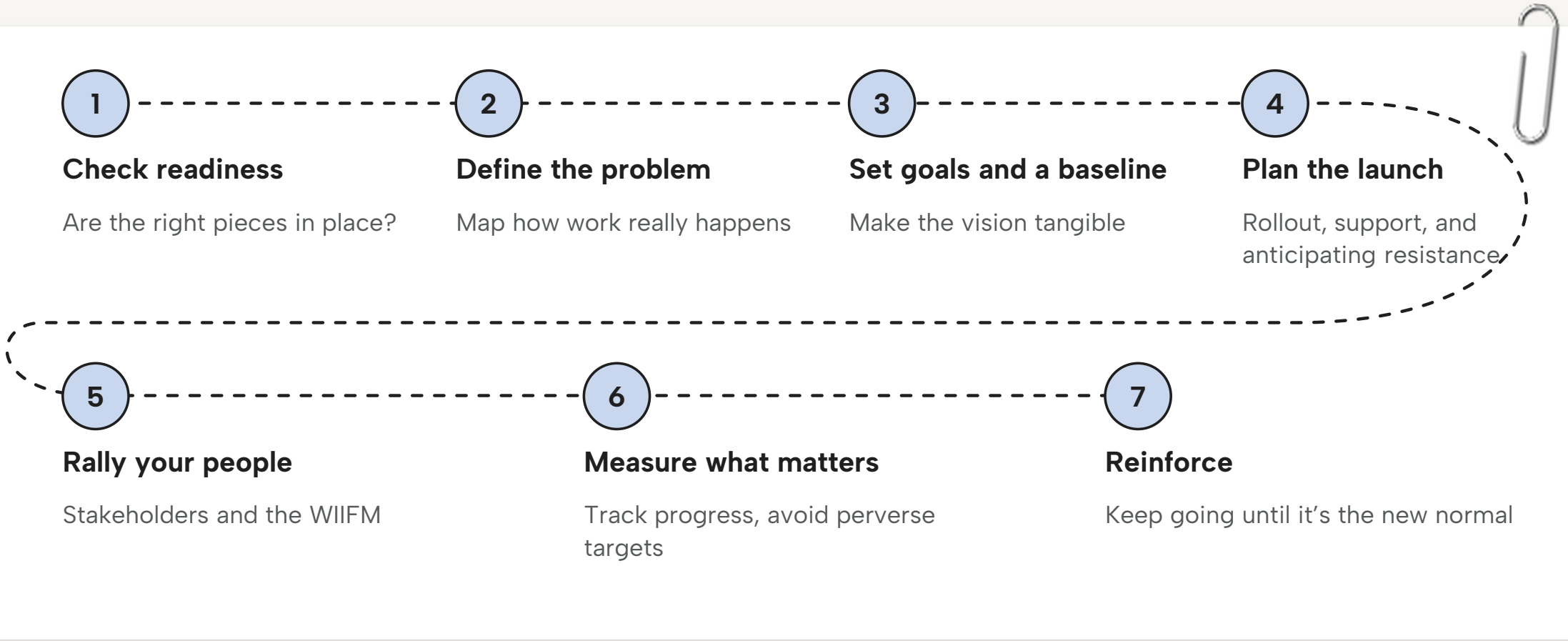
The uncertain unknown

A flawed but familiar process feels safer than an efficient one you haven't learned yet.

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THE ROADMAP

Seven steps from idea to habit



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STEP 1 · CHECK READINESS

What are common changes for a proposal team?

Process

Go/no-go, kickoff calls, more time to personalize and edit

Tools

RFP software, AI, migrating content into a new system

Team

First dedicated RFP role, new ownership, formal SME roles

Content

Refresh, merge libraries after an acquisition, delete the outdated

Source: Loopio Mastering Change Management, Lesson 1

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STEP 2 · DEFINE THE PROBLEM

Map how work actually happens

IN THEORY

Sales and SMEs **pull answers** from the content hub we maintain.



IN PRACTICE

They **copy and paste** from **marketing collateral** that is three years out of date.

You can't improve what you don't understand.

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Which pitch would you fund?



A

"We have **to do something** about handing in proposals **at the last minute**."

B

"The **first pass takes too long because** the team writes net-new answers for every proposal. Generative AI drafting would let them focus on tailoring, and **cut time to completion by X hours**."

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STEP 3 · SET GOALS AND BASELINE

From theoretical to tactical

SUCCESS STATEMENT

In the next **[weeks or months]** we will implement **[specific change]** to achieve **[team objective]**. This supports the business goal of **[goal]**.

We will track **[metrics]**. **[Team or role]** will be measured on **[metric]**.

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STEP 3 · SET GOALS AND BASELINE

Measure before you change anything

- Annual RFP volume
- Advancement rate
- Automation rate
- Win rate
- Cost per bid
- Revenue tied to RFPs
- Time per RFP
- Stakeholder check-in

> Top performers, who win more than 50% of the RFPs they respond to, are more likely to track granular process metrics.

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STEP 4 · PLAN THE LAUNCH

Build the support system

Live, hands-on training

People learn by doing. Give them a real task.

On-demand resources

Two-minute videos and one-pagers, pinned where people look.

Managers measured on adoption

So they can coach, not just hear about it.

Content cleanup first

AI needs quality raw material, or you get hallucinations.

Some healthy competition

A leaderboard and a few gift cards go a long way.

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STEP 5 · RALLY YOUR PEOPLE

Find your champions, first

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STEP 5 · RALLY YOUR PEOPLE

> “Unless it’s instilled from the very beginning, ***why we’re doing this*** and what the ultimate impact is going to be, you’re gonna lose people immediately.”



Lisa Longley
Vice President, Weber Associates

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STEP 5 · RALLY YOUR PEOPLE

Lead with "*What's in it for them?*"

Executives

Speak in the results they're measured on: revenue, efficiency, time and cost.

Example: **171 vs 120** responses a year

SMEs

Speak in results that will improve their day-to-day.

Example: Provide answers **once** instead of copy/pasting for every new project.

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STEP 6 · MEASURE WHAT MATTERS

Track 2-3 North Stars

Leading: early feedback

- [ ] Time spent per RFP
- [ ] Stakeholder check-ins
- [ ] Team stress level (0–10)

Lagging: proof of impact

- [ ] Advancement and win rate
- [ ] Revenue tied to RFPs
- [ ] Cost per bid and automation rate

Round it out with content freshness, library growth, and the share of contributors using the recognized process.

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STEP 7 · REINFORCE

How to make it stick

Build a resource library

"We all forget training." Make help two minutes long and easy to follow.

Set expectations and *hold* them

Everything goes through the new process. No exceptions.

Repetition, repetition, repetition

You'll know it's working when people repeat it back to you.

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THE NEW BASELINE

Eventually, the change becomes the *new baseline.*

You're not just fixing *one* workflow. You're building *the muscle* your team needs for whatever comes next.

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RECAP

Three Key Takeaways

1

Know the human factors

Habits are slow, load is real, and resistance is human, not malicious.

2

Build the business case

Name the problem, set tangible goals, map stakeholders, answer WIIFM.

3

Reinforce until it’s normal

Measure holistically, support people, hold the line, and repeat the why.

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NEXT STEPS

Start small. Do these three things.

1. Write one success statement for your next change.
2. Set your success measures (2–3 North Stars).
3. Book a 15-minute progress check-in a month from now.

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or visit loopio.com/academy

