regoUniversity

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Leading Change

Your Guides:

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Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

Agenda

- Why is Organizational Change Management Important?
  - Impacts of not recognizing the need for an Organization Readiness (OR) Plan
- What are the components of Organizational Change Management?
  - Considerations and activities for building a good OR Plan
- How to execute Organizational Change Management
  - Framework – Proven Methodologies and Tools
- Q&A

Why is Change Management Important?

"PPM is a Human Story"

People – Process – Tools
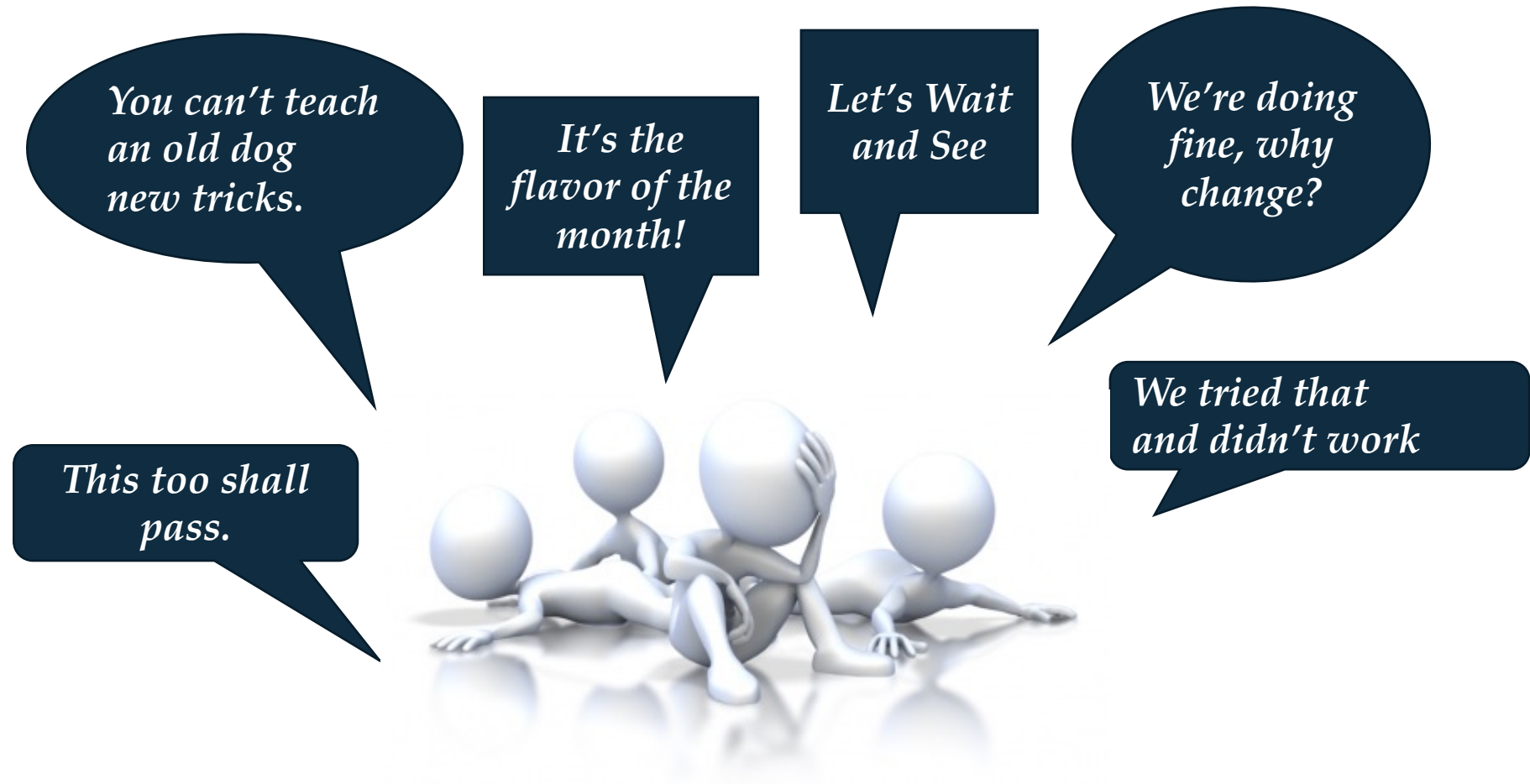Diversity of users

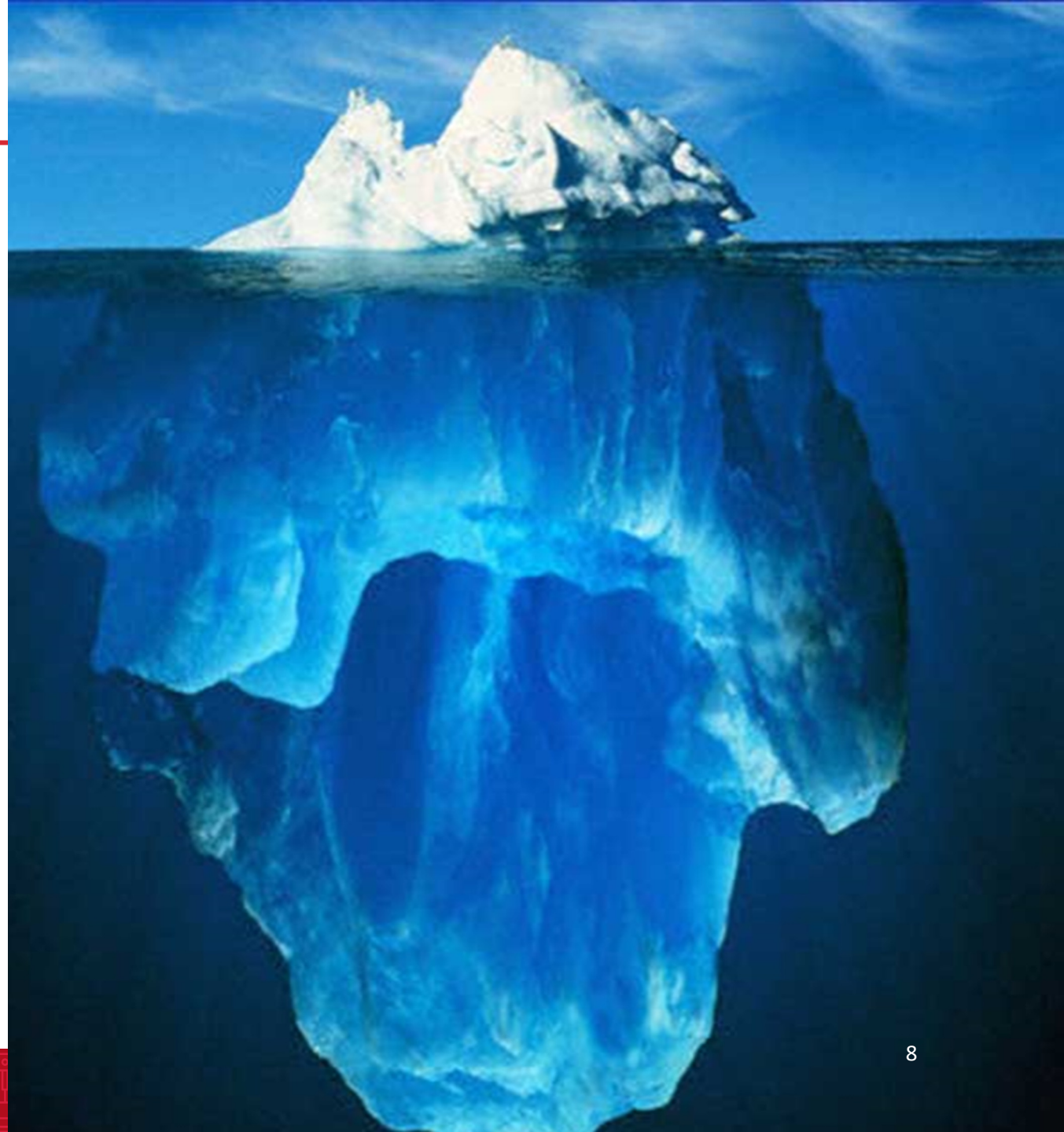70% - 80% of change initiatives fail to achieve their desired results

Why?

Faces of Resistance

What's Really Happening?

- Low Trust

- Lack of understanding and belief

- Misaligned values and objectives

- Perceived lack of ability

- Lack of focusing on results

Why Change Management?

To enable individuals to adopt new values, skills, and behaviors so that business results can be achieved for the organization as a whole.

It is fundamentally about people.

If people don't change how they do their job,
then it doesn't matter what specific changes are implemented.

If people don't change how they do their job,
then we ultimately won't achieve what we
set out to do from the beginning.

Source: Change Management, Jeffrey Hiatt and Timothy Creasey

How You Change Is Just As Important As What You Change - Change is Inevitable
Success is Optional

Open Mic

- Have you experienced these types of 'failure to embrace change'?

- What practices have you employed to prevent or overcome them?

- Are organizational readiness activities incorporated into your project/value delivery approach?
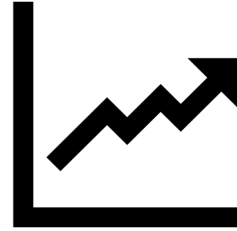
Components 0f Organizational Change Management

Organizational Change Management

- Focus on value **at all levels** of the organization
- Over-communicate

- Be Tactical
- Define accountability

- Ensure people know how to do what they need to do

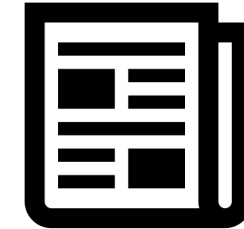### Why change?
- WIFM
- Greater Good - Show the value to the organization
- Inevitability

What do I do?
- Have a clear, simple Policy on what needs to be done and when

How do I do that?
- Training
- Reference

Best Practices

Nirvana: Have a dedicated Change Management Lead

What Change activities can you complete to be successful?

1. **Provide crystal-clear communication**
2. **Consider your culture**
3. **Pace yourself**
4. **Create accountability**
5. **Measure your success**

Crystal-Clear Communication

Why Change?

What is the value? What's in it for each persona?

What does it mean to the audience?

Be crisp and clear about impacts – understand and communicate the before-and-after experience

What is expected?

Anticipate concerns

Fit - Consider Your Culture

Culture is like the wind. It is invisible, yet its effect can be seen and felt.

When it is blowing in your direction, it makes for smooth sailing. When it is blowing against you, everything is more difficult.
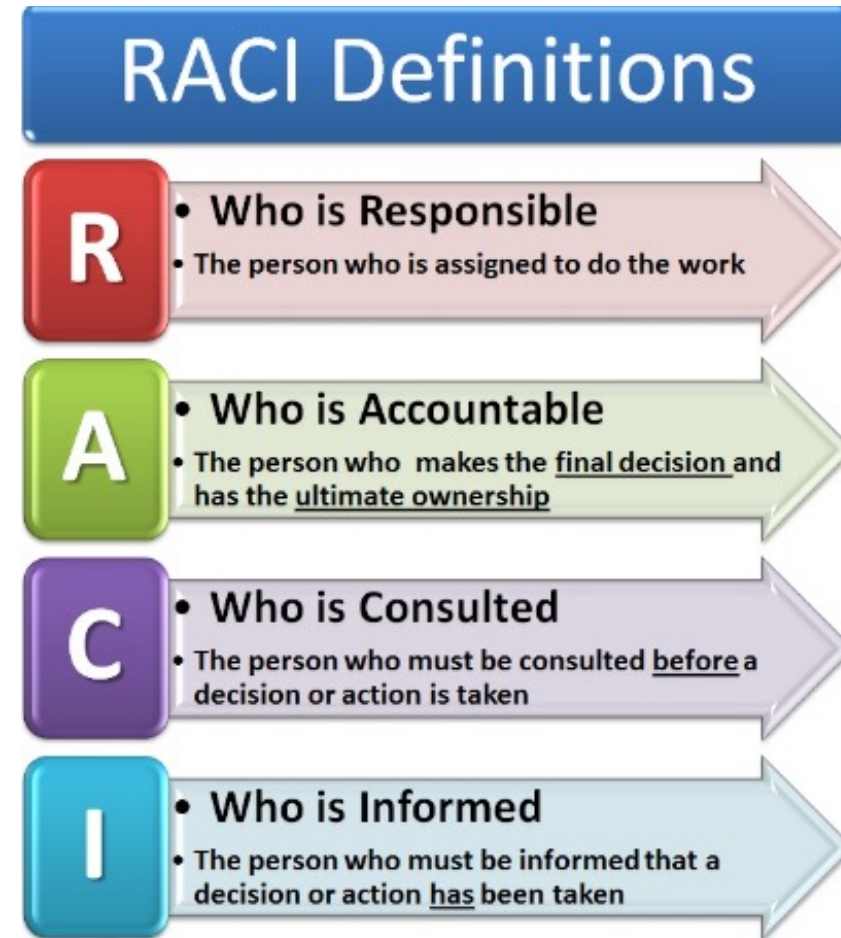
Absorption - Pace Yourself

Remember, keeping pace with employees and meeting them where they are will allow you to lead your change effectively and keep the doors of communication open throughout your change effort.

Ownership - Create Accountability

Giving your employees a well-defined set of responsibilities can empower and engage them because they feel they have a hand in the organization's plans for change.

*Does this change with Tooling implementation?

RACI Definitions

R — Who is Responsible
- The person who is assigned to do the work

A — Who is Accountable
- The person who makes the final decision and has the ultimate ownership

C — Who is Consulted
- The person who must be consulted before a decision or action is taken

I — Who is Informed
- The person who must be informed that a decision or action has been taken

Observe - Measure Your Progress and Identify Adjustments

1 – Adoption Metrics

2 – Qualitative/feedback metrics

3 – Employee Performance

4 – Overall Project Performance

5 – Readiness Assessment

Collect the employee feedback and compliance information

Analyze the data; look for patterns and themes

Prepare summaries of key findings

Organize findings so that they can be quickly and easily understood

Evaluate the overall effectiveness of the change management program, identify any opportunities, and take action

Don't forget to celebrate your successes!

Change Readiness

A change readiness assessment will provide the information necessary to drive adoption in the organization.
Its recommended the survey is sent at the start, middle, and end of the project. The results will provide metrics to show you how well your teams adopt and move through the change curve

Objectives

- Monitor the movement of employees on the change curve as it relates to the (Insert Project Name), from being unaware to owning the change
- Understand needs and concerns in order to better drive adoption of the change through OCM activities

Approach

- Baseline survey sent (Insert Date) to collect concerns and help to move users of the (Insert Project Name) through the change curve.
- Distributed survey and collected responses

Participants

- Baseline Survey (Example):
  - Sent survey to XXX people in the Finance, Human Resources, Supply Chain and 'Other'
  - We received a response rate of XX%
- April YEAR Survey (Example):
  - Sent directly to impacted users
  - Response rate of XX/XXX = XX%

Key Takeaways

Not achieving adoption is expensive and undesirable –

which leads to poor perceptions

By leveraging a thoughtful approach, we can

build an adoption solution *for* PPM

– not just '...*and* PPM' –

that is **baked into the ecosystem**.

This, by comparison, is inexpensive –

and as the industry is proving

it is imperative to **value delivery**.

Organizational Change Management Execution

Change Management Guidance

"Don't re-invent the wheel"

1. Leverage Your Resources and Make Them Your Own

2. Document and Follow Guiding Principles

3. Communication Plan & Training Strategy

4. Define and Articulate "What's In It For Me?"

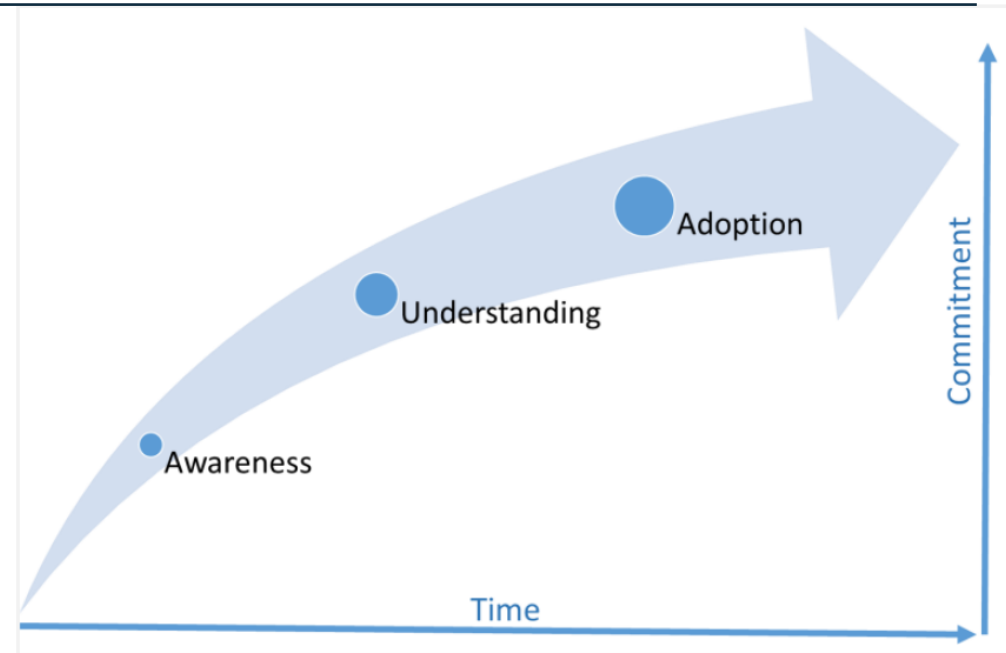5. Organize Organizational Readiness (OR) Artifacts

1. Leverage Your Resources and Make Them Your Own

"The difficult part is building and working the plan,
not understanding the concepts."

Common Denominators

1. Preparing for change

2. Planning for change

3. Managing change

4. Monitoring change

2. Document and Follow OR Guiding Principles

OR Values Examples	OR Deliverables Examples
• Formal Process & Defined Methods	• Impact Assessment and Needs Analysis
• Reusable & Scalable Templates	• Communication Plan
• Message Consistency *shared between Personas, when possible*	• Training Strategy
• Quickly Consumable; Focused on *Personas "What's in it for me?"*	• Communication Templates
• Right Content at the Right Time, Valuable, from most Credible Source *not spam*	• Training Templates
• Focus on Process, Outcomes *not on the tool*	• Success Metrics
• Excitement and Fun – *part of company ROI*	• Lessons Learned

2. Document and Follow OR Guiding Principles

"OR is People doing Processes that add Value."

Assumptions Example	Key (Reusable) Artifacts per Release *Used for each onboarded group*
Quality of all communications must be high enough to be delivered only virtually	• **"Elevator Pitch"** with "5 why outcomes" *Business Need; Concept and Design* • **Logo and one-page Infographic** *Business Need; Concept and Design* • **Persona "What's in it for me?"** *Business Need; Concept and Design*
Preferred Methods Examples	• **Email and Invite Templates** from PMO for direct communication *Knowledge, Ability*
• General and Targeted Email • Targeted Training Invites • Intranet • Service SharePoint site • Leader Update Call • Leader Highlights Newsletter • Functional Town Hall • Interactive Training Presentations • Videos • System Portlets / Dashboards	• **Intranet Template** for general communication *Business Need; Concept and Design* • **Portlets Templates** *Knowledge, Ability, Reinforce* • **Video and Training PP Templates** hands-on exercise and quiz (CAPA) *Knowledge, Ability, Reinforce*

3. Communication Plan & Training Strategy

Impact of OR	Change Phase	Communication		Audience			
				Teams / General	Project Managers	Portfolio Managers	Leadership / Stakeholders

30%	**Cognizance & Craving**	**Kickoff of each release.**
		• **Calendar:** Leadership Update Meetings & Messages, Current News Intranet.
		• **Request: section to share artifacts**
		  • Train PPM Core Team
		  • "Elevator Pitch"
		  • Logo and 1 page Infographic
		  • Persona "What's in it for me?"
			Pain / Value
			WHY
				X	X	X	X

	Information *Education*	**Each onboarded group:** • Data load activities; Training preparation one-on-one, team conversations • *What to Expect* direct email • Video, PowerPoint, Virtual training direct invite	Perspective Conception **WHAT**		X	X	
20%	**Skills Building** *Training*	**Each onboarded group:** • Virtual Hands-On Training • Office Hours direct invite • PPM Certification?	Deliver **HOW**		X	X	
50%	**Fortification**	**Ongoing:** • System Portlets • Office Hours • Re-assess OR approach for next Release • Links: Process and Training Library • CAPA • Recorded Hands-On Training • Company Objectives – required for position • Formal Project Approvals and Stage Gates • *Health* audit	Operationalized Continued Efficiency & Value Realization **IMPROVE**		X	X	

4. Define and Articulate "What's In It For Me?"

"Reused Consistent Audience Value Perspective."

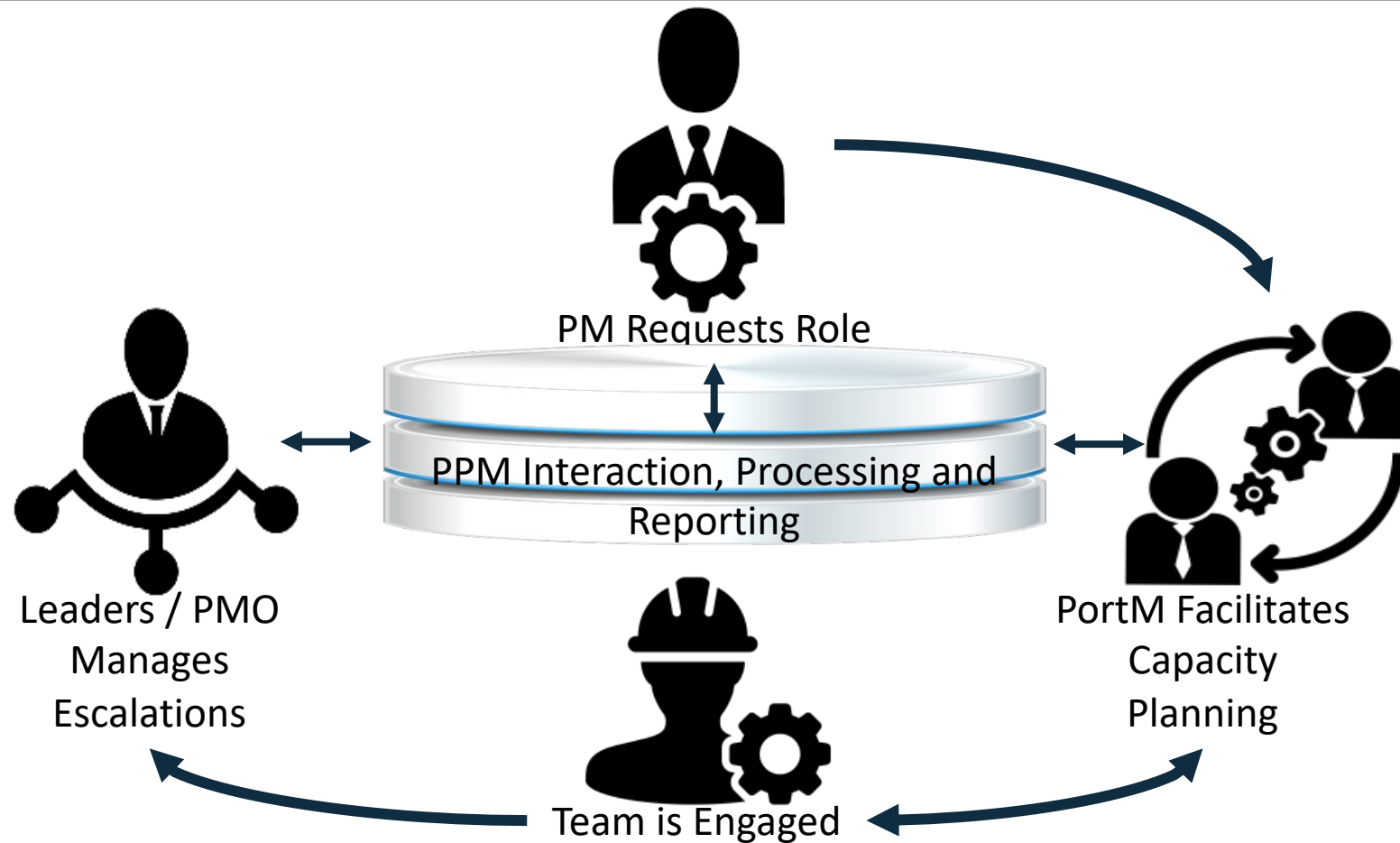| Project / Program Managers	Portfolio Managers	Leadership / Stakeholder	Teams / General

• Streamlined Process and System Best Practices
• Clear Escalation, Support of Project Status (Scope Schedule Budget), Risks Issues
• Project Team Roster Visibility
• Project Financial Reporting
	• Standard Information to Make Portfolio Level Decisions, Approvals, Changes
	• Process Cadence
	• Prioritization & Staffing Channels
	• Capacity Planning, What-If Scenarios
		• Concise, Consistent Reporting:
		  • Portfolio Level
		  • Ability to See Granularity of Project Status
		  • Risk, Issues
		  • Schedules and Teams
			• Know Assignments
			• Identify Over Allocations and Priority
			• Understand Project Demand and Current Status
			• Engagement of Business Objectives and ROI

4. Define and Articulate "What's In It For Me?"

"Reused Consistent Audience Value Perspective."

PM Requests Role

PPM Interaction, Processing and Reporting

Leaders / PMO Manages Escalations

PortM Facilitates Capacity Planning

Team is Engaged

5. Organize OR Artifacts

"Organize OR Artifacts: Plug and Play."

- OR Schedule

Date to Work	What to Build/Schedule	When to Deliver	Who is the Audience	Notes
Sample				

- OR Plans

Communication Type	Distribution Method	Audience	Types of Messages	Frequency
Sample				

Open Mic

- What communication practices have you found to be effective?
  - Methods and tips for email, office hours, webinars

- How do you reuse artifacts?

Swag Bag (Key Takeaways)

1 The difficult part is building and working the plan, not understanding the concepts

2 OR is People doing Processes that add Value!

3 OR Strategy: Why, What, How, Improve

4 Reused Consistent Audience Value Perspective

5 Organize OR artifacts: Plug and Play!

Refence additional regoUniversity content around Vision, Adoption, Metrics and Compliance

Questions?

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- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

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