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OCM Workshop Beyond the Project Plan: A Change Management Road Trip

Your Guides:

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Learning Objectives

By the end of this session, participants will:

Understand:

why change management matters to the success of your Clarity initiative

Identify:

the people, behaviors and organizational changes your project will create

Plan:

practical change management activities for your project and identify the next steps needed to support adoption

Welcome & Workshop Overview

Introductions

Max 30 seconds

Agenda

- Welcome & Workshop Overview
- Why Projects Need Change Management
- Mapping Change Activities to Your Project

Break – 10 mins

- Apply It: Build Your Change Plan
- Group Debrief & Best Practices
- Action Planning, & Wrap-Up

Why Projects Need Change Management

Quick Check In

Code: 6408 7800

Why Projects Need Change Management

We plan for the launch – but not the adoption

IMPLEMENTATION

- System configured
- Processes designed
- Training delivered
- Go-live achieved

ADOPTION

- People understand the change
- People use Clarity as intended
- New behaviors become routine
- Business value is realized

Go-live is a milestone. Adoption is the outcome.

Where Adoption Gets Lost

The technology can be ready before the organization is

Gaps we regularly see

Unclear WHY

People don't understand why the change is needed

Limited INVOLVEMENT

People affected by the change weren't engaged early enough

"Training = READY"

Training happens, but people aren't prepared to work differently

Leaders NOT ALIGNED

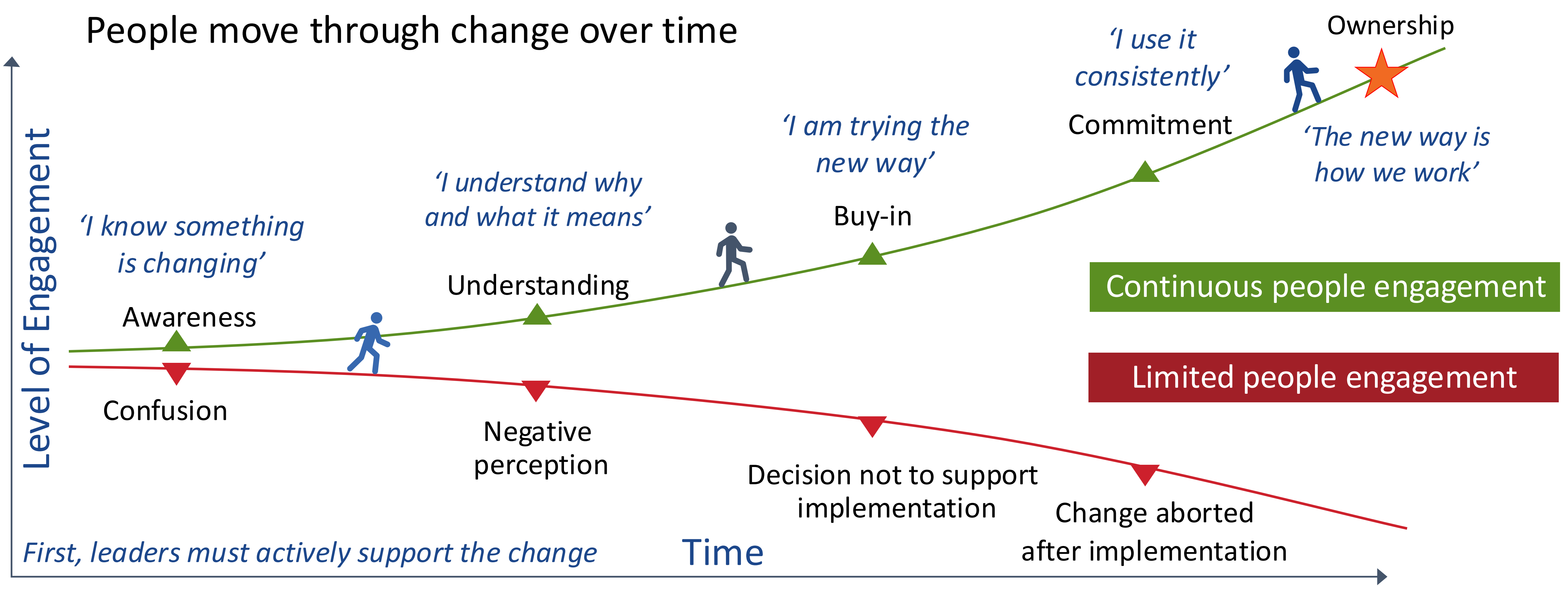
Leaders aren't reinforcing the same message or expectations

No REINFORCEMENT

The project moves on before new behaviors become habits

DISCUSSION: Which of these creates the greatest risk for your initiative?

Change Is a Journey



Our job isn't simply to communicate the change. It's to help people move toward adoption.

Map Change to Your Project

Change management should be integrated throughout the project lifecycle

Examples of change management activities across the project lifecycle

Discover	Design	Prepare	Launch	Adoption
✓ Leadership alignment	✓ Future state	✓ Communications	✓ Support	✓ Adoption measures
✓ Stakeholder map	✓ Change strategy	✓ Training	✓ Feedback	✓ Reinforcement
✓ Case for change	✓ Engagement	✓ Readiness	✓ Issue resolution	✓ Sustainment
✓ Key Risks / Challenges	✓ Change Impacts	✓ Champions	✓ Quick wins	✓ Lessons learned

Which activities should you prioritize for your project?

The Change Management Toolkit

FOR REFERENCE

What activities might your project need?

Discover
Understand the Landscape

Find your starting point – understand where you are, why change is needed, and what success looks like.

Sponsorship | Stakeholder Mapping | Case for Change

- **Ensure Sponsor and Top-Level Support** (i.e., Change Network)
- **Common Ground Assessments** (i.e., culture assessment, leadership data)
- **Change Connectors** (i.e., applying previous lessons learned)
- **Change Spark** (i.e., case for change, why alignment)
- **Stakeholder mapping** (i.e., stakeholder identification and analysis of those impacted and involved)
- **Change Management Hub** (i.e., knowledge management for continuity)

Design
Architect the Change

Map the path – craft a clear plan that aligns leadership, engages stakeholders, and drives action.

Adoption Strategy | Leadership | Comms & Engagement

- **Engagement Strategy** (i.e., employee recognition and end-user strategy)
- **Employee Experience and Adoption Success Criteria / KPIs**
- **Leadership as a Force Multiplier** (i.e., leadership performance expectations)
- **Change Impact Assessments**
- **Communication and Engagement Plan**
- **Add on: Sparkle Plan**

Prepare/Implement
Mobilize the Change

Execute with purpose – build readiness, remove barriers, and deliver results with clear KPIs.

Adoption Prep & Barrier Removal | Training and Onboarding | Mission Control

- **Adoption KPIs Execution & Adoption Risk Management**
- **Launch Preparation Check(s)**
- **Training and/or Onboarding Needs Assessment, Planning, Execution**
- **Resistance Management**

--Continued Execution--

Embed and Uplift
Make Change Stick

Lock in progress – reinforce change and sustain momentum.

Adoption Measures | Course Corrections | Sustain Momentum

- **Adoption Solutions** (e.g., feedback, concerns, Q&A, office hours)
- **Feedback Loops**
- **Training Refresher Needs Assessment, Planning & Execution**
- **Quick Wins, Benefits and Impact Measurement**
- **Continuity Handover to Client**

The Change Management Roadmap

What activities might your project need?

ALIGN
- Case for change
- Leadership alignment
- Stakeholder mapping

ENGAGE
- Communications
- Stakeholder engagement
- Change champions

UNDERSTAND
- Change impact (from – to)
- Stakeholder analysis
- Readiness

ENABLE
- Training
- Tools & resources
- Support

SUSTAIN
- Adoption measures
- Reinforcement
- Lessons learned

Break – 10 minutes

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Interactive Working Session

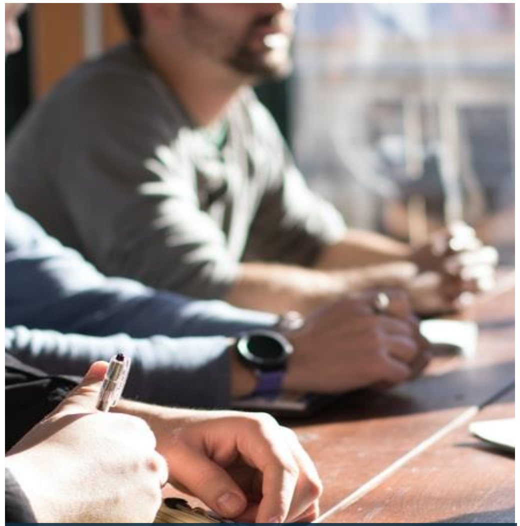
Interactive Working Session

Build in Change Management activities that engage your stakeholders and supports adoption

Topics covered:

Background & objectives

Your change approach



Engaging stakeholders

Making it happen

Outcome: A practical change plan for your initiative

Breakout 1 – Background and Objectives

Change impacts	Change Management challenges	Change success factors
• what is changing? • who is impacted? • what will be different for them?	• what could get in the way? • what are the dependencies? • what are the change risks? • key resistance areas?	• what will they need to be successful? • how would you address the challenges>

Change Management priorities

- Given the above, what are the key priorities for managing the change?

Case for Change - Overview

What is a Case for Change?

A Case for Change is a tool used to clearly articulate the rationale behind a change initiative. It serves as the foundation for the Elevator Pitch, helping to explain the change in simple, impactful terms. It is co-created with program leaders. The Case for Change is the big idea behind the transformation, its purpose *and* benefits

Why do we use it?

- The purpose of the Case for Change is to build consistent understanding and recognition of the reason/need/urgency for change across all stakeholders
- To align all stakeholders on the reasons for the change and create a consistent, compelling message for those impacted.
- The Case for Change brings alive the change opportunity and imperative, and inspires people to action

Case for Change - Overview

When should we use it?

It is typically used during the Prepare stage of the Change Management process to define key messages and develop the Elevator Pitch. This pitch is then used to communicate the change across the organization.

How do we use it?

Guides the creation of the Case for Change by clearly defining:

- The burning platform (why the change is necessary)
- The solutions (what will be done)
- The approach (how it will be achieved)
- The benefits (what the outcome will look like for customers, employees, and the organization)
- The vision (what the future will look like when we are done)

Once developed, this content is used to craft a short, 3–5-minute Elevator Pitch that communicates the essence of the change initiative.

The Case for Change can be expressed through different media, formats and channels – but it must consistently and coherently demonstrate the rational for change and inspire those impacted by the change.

Vision and Case for Change – what, why and how?

What is it?	• The Case for Change is the big idea behind the transformation, its purpose *and* benefits
Why use it?	• The purpose of the Case for Change is to build consistent understanding and recognition of the reason/need/urgency for change across all stakeholders • The Case for Change brings alive the change opportunity and imperative, and inspires people to action

Key Steps	• Leadership needs to align on the answers to 4 generative questions that target motivating factors
	    • Why change?
	    • What's changing?
	    • Why now?
	    • What are the benefits?
	• When these answers are unified and anchored in a bold vision, they become more than messaging – they become momentum.
	• No matter how you communicate it—presentations, conversations, or campaigns—your Case for Change should be consistent, coherent, and inspiring, giving people both the logic to understand and the motivation to act.

Case for Change - Template

0. Guidance Before You Start:
Use words that are easy to understand
Avoid jargon and acronyms
Be specific and tangible where possible

1. Consider the following questions:
Why do we need to change? / What is the trigger for this initiative?
What customer or internal pain points are we currently experiencing?
What happens if we don't change?
How is this linked to the business strategy?

Burning Platform 'Why Now'

- XXX
- XXX
- XXX

Wh

2. **Describe what is going to change / be implemented** (consider strategy, governance, processes & systems, people skills/behaviors and performance elements).

- XXX
- XXX
- XXX

How

3. **Describe how the change is going to be implemented.** Think about different phases and high-level milestones, who is going to be involved.

- XXX
- XXX
- XXX

Benefits

4. Indicate what the Qualitative outcomes Will Be for Customers and Employees (and/or Other Key Stakeholders)

- XXX
- XXX
- XXX

5. Prepare a Vision statement of what the future looks like—paint a vivid, tangible picture of success so people can clearly see what will be different, how it will feel, and the role they play in making it real.

Vision

Case for Change - Template

Burning Platform ‘Why Now’

- XXX
- XXX
- XXX

What

- XXX
- XXX
- XXX

How

- XXX
- XXX
- XXX

Benefits

- XXX
- XXX
- XXX

Vision

Case for Change – Example

FOR REFERENCE

Vision and Case for Change

Vision: Replace fragmented Excel-based BOC process with a centralized, governed, and scalable solution to improve project management, financial planning, data integrity, and decision-making.

The Problem

Today, the Excel-based BOC is being used beyond its intended purpose, creating multiple file versions, manual reconciliation efforts, data integrity risks, and misalignment between source data and leadership reporting;

- Fragmented, Excel-based BOC processes **limit scalability and create data integrity** risks through version-control issues and inconsistent financial data
- **Delayed decision-making and increased financial risk** driven by manual workflows that prevent timely updates to planning and reporting.
- **Lack of governance and transparency** caused by decentralized ownership and management of BOC files across teams.
- **Inaccurate and disconnected financial insights** due to missing integration between BOC and ProPM for actuals and forecasts.
- **Inconsistent reporting** and reduced comparability stemming from the absence of standardized transaction classifications and ERP normalization.

What

We are transforming the current Excel-based BOC model into a **centralized, ProPM integrated financial capability** to establish a governed and scalable foundation for enterprise financial planning. This change **replaces fragmented spreadsheets and manual handoffs**, with streamlined, integrated processes, enabling consistent, auditable, and timely financial data. As a result, the organization is better equipped to support **informed investment decisions, portfolio prioritization, and profit planning**.

We will apply Organizational Change Management best practices to drive communication, engagement, and sustain long-term change.

How

Phase 1:
Migrate project cost management activities from Excel to ProPM (i.e., Resource planning, Capital & Operational expenses forecast)

Phase 2:
Migrate PLM planning activities from Excel into ProPM.

Phase 3:
Integrate & implement a bi-directional financial model module that containerized all financial calculations. Module will extract NPI project sales & benefits and project cost from ProPM. Perform calculations & send back all financial metrics into ProPM.

Benefits

- Increased efficiency and scalability through ***centralized, automated*** financial data processing that ***improves data quality and consistency***.
- ***Faster, more informed decision-making*** through automated workflows and timely access to planning and reporting data.
- Enhanced ***transparency*** and ***stronger governance*** through centralized data management and improved stakeholder visibility.
- Improved ***data accuracy*** and reliability enabled by Tenrox–ProPM integration, providing connected actuals and forecasts.
- A ***single source of truth*** for financial and project data through standardized classifications and normalized reporting, enabling consistent insights and comparability.

Breakout 2 – Change Implementation Approach

Where would you position each slider to reflect your initiative

What is the rationale for your choices?
What will this approach look like in practice?
What will you need to make it work?

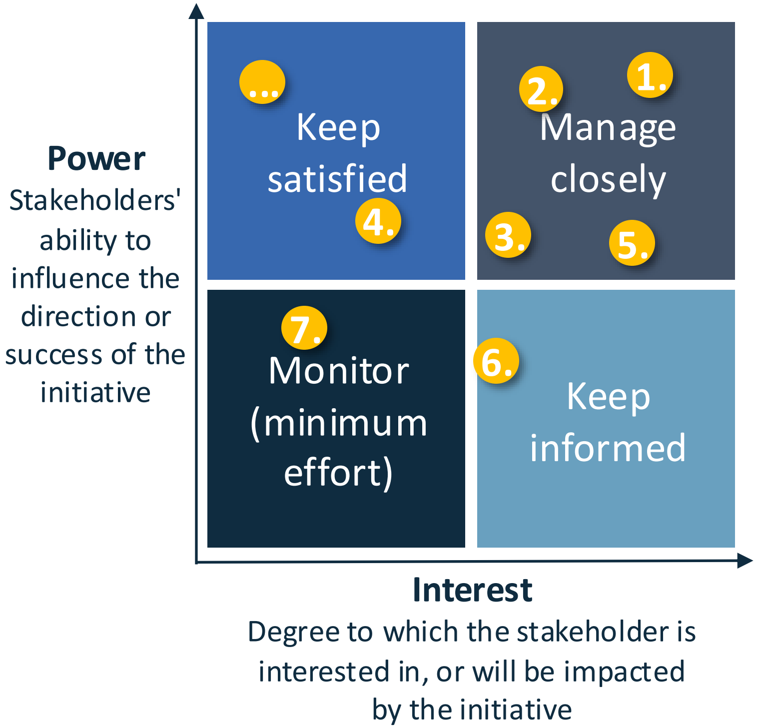
			Answers
Directive change Outcomes and approach are determined top-down	**Decision making**	**Inclusive change** Outcomes and approach are determined bottom-up	
Led by central program team The central program team coordinates and drives implementation across the organization	**Ownership**	**Leader Led** Business, market, or functional leaders own and drive implementation within their organizations	
Team by team Changes are introduced incrementally by team, business, market, or function	**Deployment**	**Whole impacted audience at once** Changes are introduced to the full impacted audience at the same time	
Phased approach Changes are introduced in planned phases or releases	**Timing**	**Big bang** All changes are introduced at the same time	

Breakout 3 – Stakeholder engagement 'Who'

Who is impacted?

How do you bring the approach (e.g., 'Manage closely') to life?

	Key stakeholder groups	Key elements of the Engagement approach
1.		
2.		
3.		
4.		
5.		
6.		
7.		
…		
…		
…		



How, when and who the stakeholder analysis will be reviewed / further detailed and what will be done with the insights

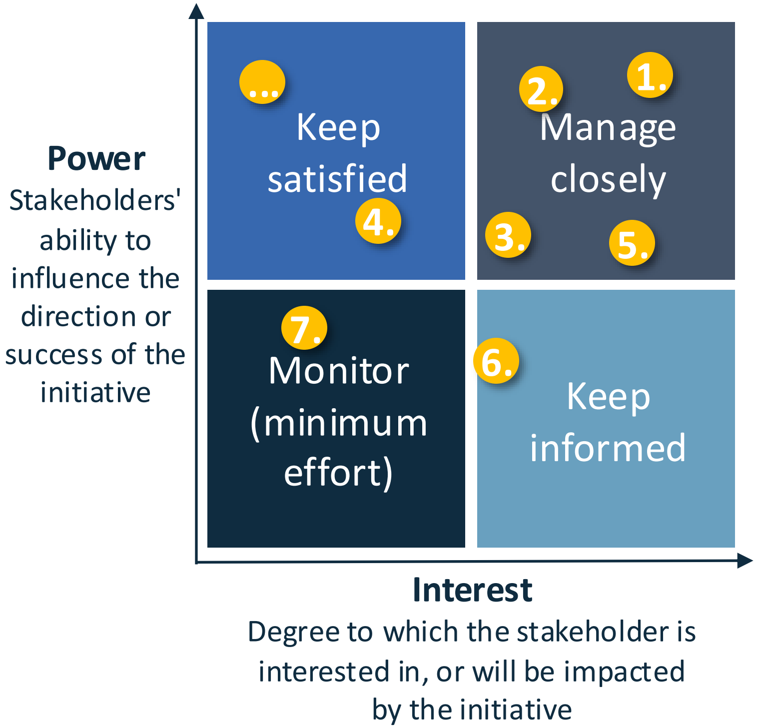
Breakout 3 – Stakeholder engagement 'Who'

Use these groups as a starting point. Add, remove or combine based on your initiative

Who is impacted?

How do you bring the approach (e.g., 'Manage closely') to life?

	Key stakeholder groups	Key elements of the Engagement approach
1.	Executive / Sponsors	Champion the change - Reinforce the vision
2.	PMO / Portfolio Leaders	Align on governance - Reinforce new practices
3.	Project / Program Managers	Involve early - Support new ways of working
4.	Resource / Capacity Managers	Align on process changes - Support adoption
5.	Finance	Align on financial processes - Address reporting needs
6.	Business Leaders	Connect change to business outcomes - Champion adoption
7.	Team Members / Contributors	Communicate what's changing - Train and support
...	IT / System Administrators	Align on system needs - Provide ongoing support
...	Reporting / Data / Analytics	Align on data needs - Support reporting changes
...	Change Champions / Super Users	Build capability - Support peers - Gather feedback



How, when and who the stakeholder analysis will be reviewed / further detailed and what will be done with the insights

Who is impacted?

Stakeholder group	Consider
Executives / Sponsors	Who needs to champion the change?
PMO / Portfolio Leaders	Who governs prioritization, portfolio decisions or standards?
Project / Program Managers	Who will use Clarity to manage projects and resources?
Resource / Capacity Managers	Who manages people, capacity and allocation?
Finance	Who relies on project financials, budgets or forecasting?
Business Leaders	Who makes decisions based on portfolio information?
Team Members / Contributors	Who will enter, update or consume project information?
IT / System Administrators	Who configures, supports and maintains Clarity?
Reporting / Data / Analytics	Who creates or consumes reports and dashboards?
Change Champions / Super Users	Who can help others adopt the change?

What is changing for them?

Key Stakeholder group	What’s changing for them
 **Executives**	New dashboards, information and decision-making processes
 **Project Managers**	New expectations for planning, status reporting and data entry
 **Team Members**	New ways to receive assignments or update project information
 **Finance**	New processes for project financial management

What Do They Need?

What will help them successfully adopt the change?

What will each group need to successfully make that change?

→ communications

→ engagement

→ training

→ leadership support

→ readiness

Successful Clarity implementation isn't just about delivering the solution.
It's about helping people adopt new ways of working.

Build Your Change Approach

The activities we've completed provide the inputs for your Change Management approach

Build your plan	Key question
1. Change	What is changing?
2. People	Who is impacted?
3. Risks	Where could adoption get stuck?
4. Activities	What do people need from us?
5. Timing	When should activities happen?
6. Ownership	Who is responsible?
7. Adoption	How will we know it's working?

Group Debrief

What did you discover?

- What was your biggest ah-ha moment?
- Where is your biggest adoption risk?
- Which activity needs to start earlier than you expected?
- What will you do differently because of this exercise?

Top 5 Best Practices for Managing Change

What successful change efforts have in common

Start early
Change management isn't something you add at go-live

Know your people
Understand who is impacted and what is changing for them

Engage leaders
Leaders are critical to creating alignment and reinforcing the change

Make it tangible
Help people see and experience what their future state will look like

Measure adoption
Don't stop at "we trained everyone." Look for evidence that behaviors have changed

Action Planning & Wrap-Up

Turn insights into action

My biggest change risk:

The people I need to engage:

The activity I need to start:

My next step:

Key Takeaways

Go-live is a milestone. Adoption is the outcome.

Implementation gets you live

Define the behavior and plan for adoption – *not just the rollout*

Change management helps people adopt

People need to understand it *and* feel it

Adoption is what delivers the value

Adoption happens through consistency, *not communication*

Thank you!

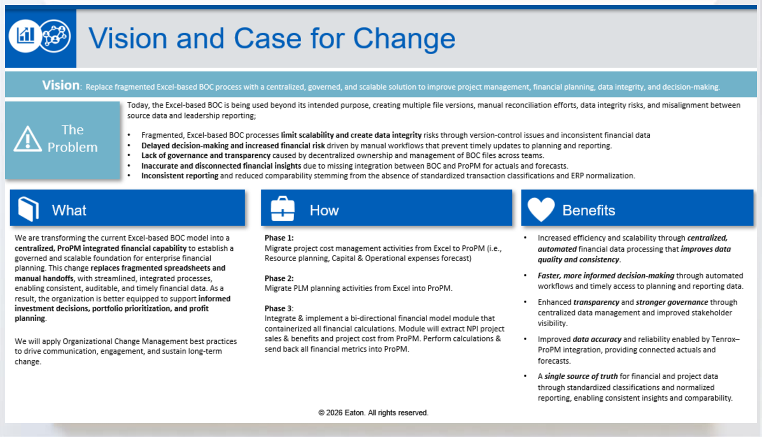
Client Example

FOR REFERENCE

Don’t just communicate the change. Help people understand, shape it, and experience it!

CASE FOR CHANGE
The ‘why’

Create a compelling reason to change



*Align leaders and stakeholders around **why change is needed and what success looks like***

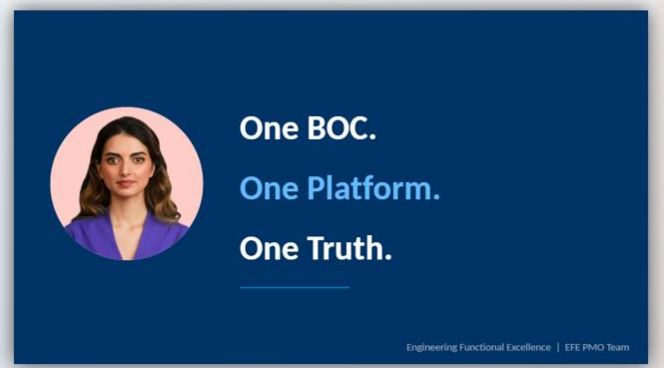
VOICE OF CUSTOMER
The ‘what’

Let people shape the future

*Use stakeholder input to identify **what needs to change from today to tomorrow***

EXPERIENCE THE CHANGE
‘bring the future to life’

Make the future real



Click Here to see the Video

*Use demos and real-life scenarios to help stakeholders **see, feel and understand their future experience***

Understand the need → Design around people → Make the change tangible

Stakeholder Engagement Techniques that Drive Adoption

Driving adoption and trust comes down to making stakeholders feel **heard**, **prepared**, and genuinely **part of the outcome** – not just recipients of change

Co-create, don't just consult
Involve stakeholders early so they shape—not just receive—the change

Make it personally relevant
Clearly connect the change to each group's goals, pain points, and day-to-day work.

Close the feedback loop
Show what you heard, what changed, and why—every time.

Leverage trusted peers
Use change champions to influence, support, and surface real sentiment

Enable two-way dialogue
Create safe, ongoing channels for honest questions and answers

Show up authentically as leaders
Be visible, transparent, and honest – especially about trade-offs

Tailor by role and highlight benefits
Customize engagement by audience and clearly state what each group gains

Prove it early
Deliver quick wins to build credibility and momentum

Use resistance as Input
Treat pushback as insight to refine the approach

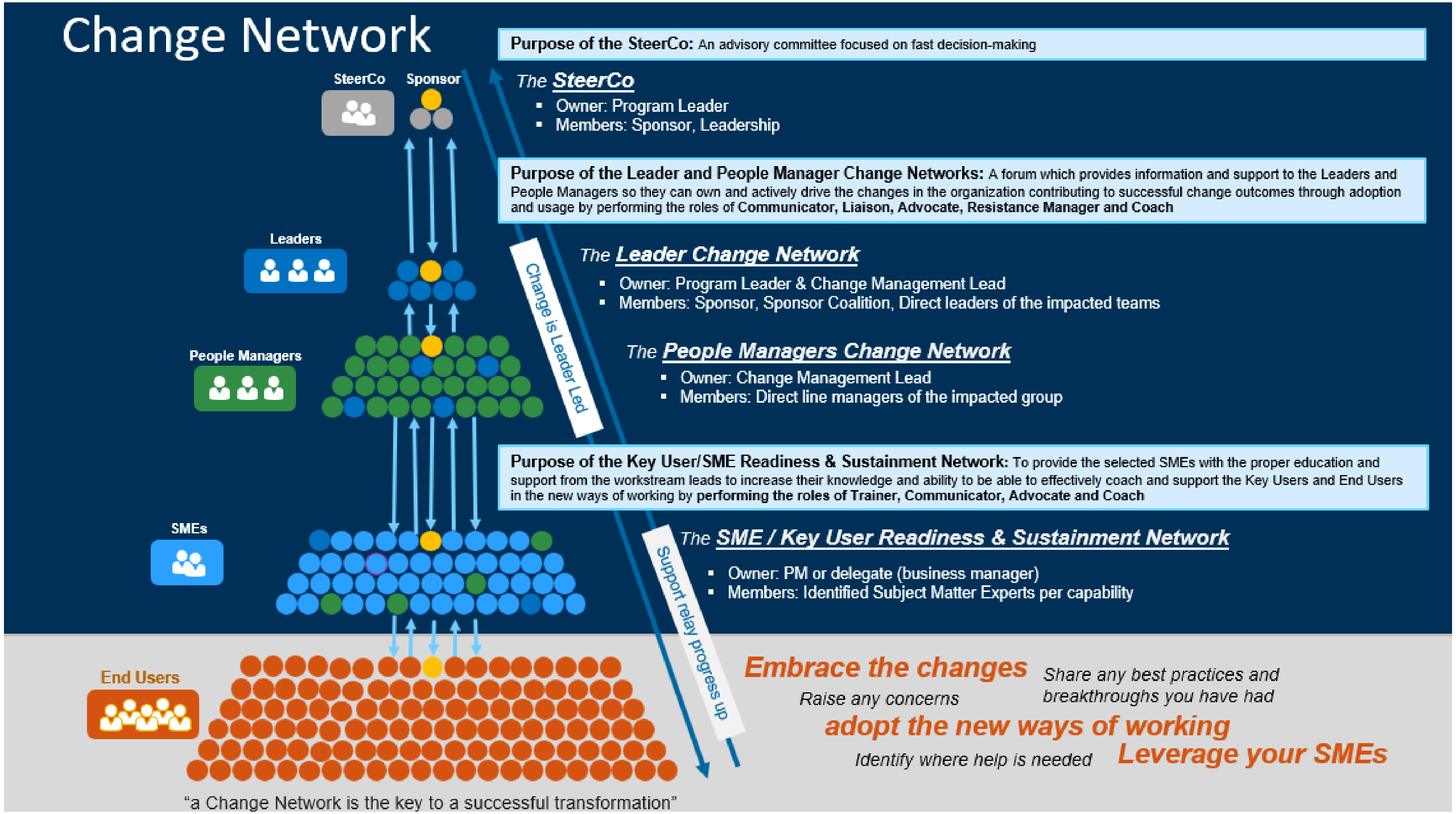
Reinforce and recognize
Reward desired behaviors to normalize adoption

Be transparent in decisions
Clarify how and why decision are made

Listen continuously
Track sentiment over time and adapt as needed

Activating the Change Champion Network

You don't drive change alone—you activate a system



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