



Mastering Change and Governance in Your TBM Program

Your Guides:



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Agenda

This session focuses on the organizational disciplines required to sustain and scale a successful TBM program. Attendees will explore effective governance models, change management practices, and stakeholder engagement techniques that drive adoption and trust. The discussion also highlights how to keep TBM aligned to evolving business priorities while maintaining control and consistency.

- Governance Structure
- TBM Office Structure
- Change Management Practices & Activities

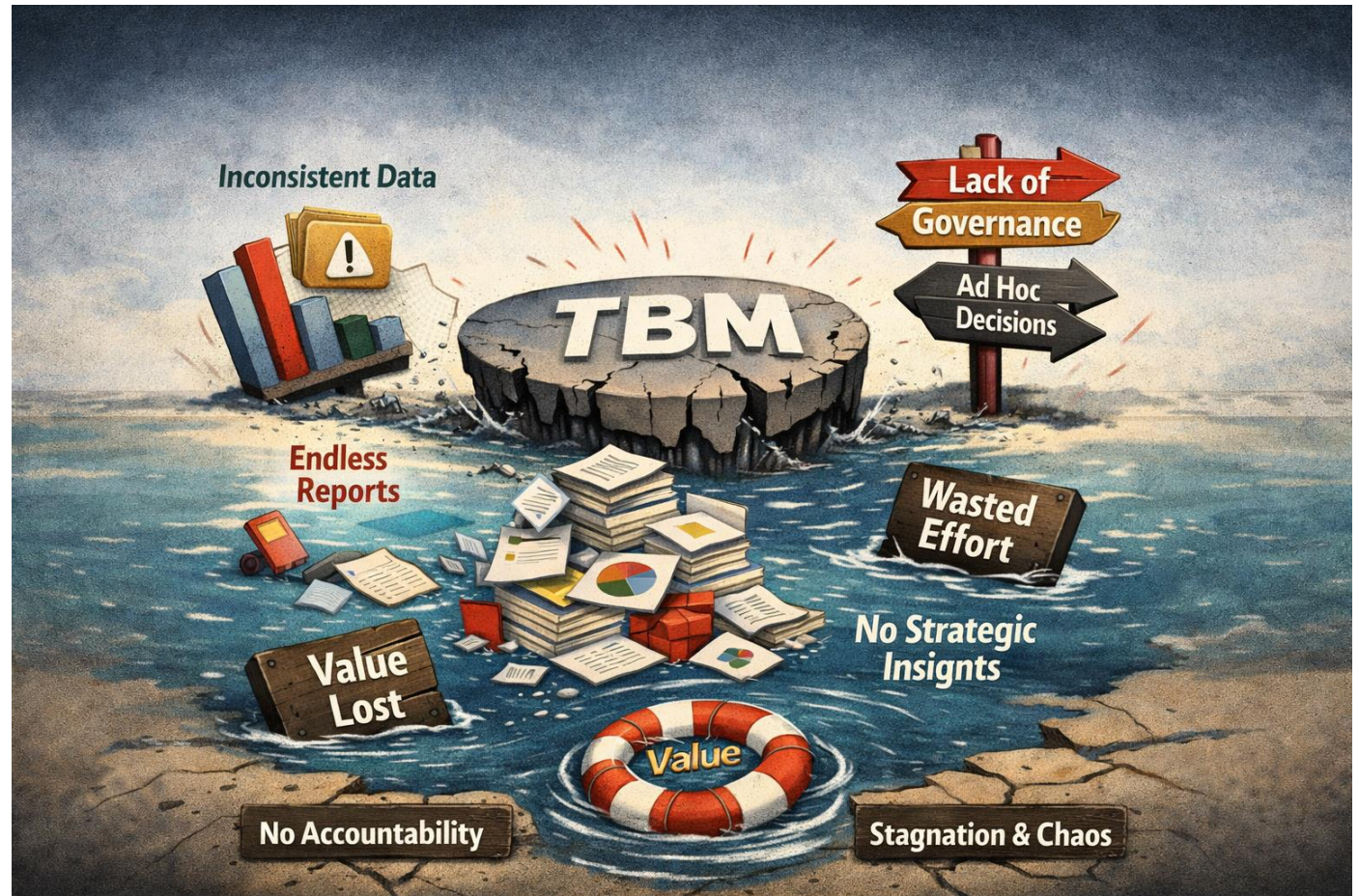
TBM Governance

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TBM Fails Without Governance and Maturity Discipline

Many organizations can stand up a TBM model. Far fewer sustain it.

Without deliberate governance, data discipline, and maturity progression, TBM degrades into a reporting exercise rather than a decision engine.

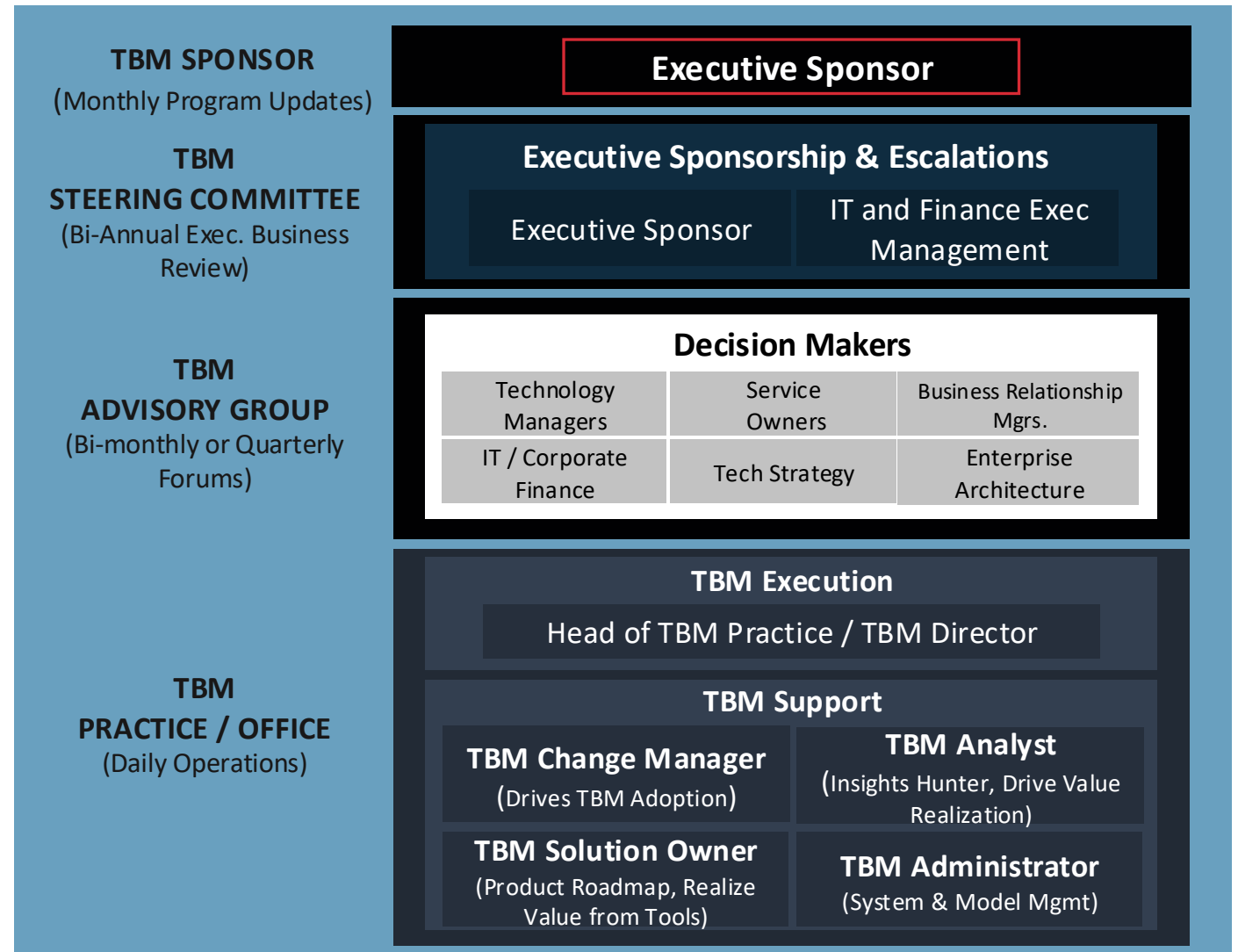


Importance of Executive Sponsorship



TBM Governance Structure

- Determine an **Executive Sponsor** who has ultimate accountability for TBM
- Establish a **TBM Steering Committee** for executive sponsorship and escalations
- Establish a **TBM Advisory Group** for ongoing operational direction and decisions
- Ensure **representation** from all stakeholders (provider and consumers)
- Provide a path for **accountability** and **issue resolution** within the organization
- Ensure a clearly defined **roadmap** with **agreed priorities** and aligned to **strategic objectives**



TBM Office

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The TBM Office RACI Matrix

TBM Council Roles & Responsibilities

RACI Matrix

R (Responsible) | A (Accountable) C (Consulted) | I (Informed)

- Executive Sponsor:** Champions the TBM initiative at the executive level, securing resources and fostering a culture of accountability.
- TBM Practice Lead/Director:** Oversees the TBM practice, enabling value conversations between IT leaders and business partners.
- TBM Solution Owner:** Maximizes the value of TBM tools and systems, managing the product roadmap and stakeholder collaboration.
- TBM Change Manager:** Plans and executes change initiatives to drive TBM adoption across the organization.
- TBM Administrator:** Configures and administers TBM systems, ensuring optimal performance and data integrity.
- TBM Analyst:** Manages TBM activities focused on analysis and reporting, providing insights to support decision-making.

Function	Description	TBM Advisory Group	Executive Sponsor	TBM Practice Lead	TBM Change Manager	TBM Solution Owner	TBM Admin	TBM Analyst
Data Management	Obtain and upload data files. Improve data quality and identify new data sources that will result in more significant insights.	I	I	A	C	R	C	C
Testing and Validation	Manage the risk caused by the inclusion of new data and functionality within the TBM model.			A	C	R	C	
Design and Maintain TBM Model	Establish, maintain, and update the TBM model. Develop and improve existing allocations. Maintain documentation of the model, its functionality, and dependencies.			A	I	C	R	C
Manage functional requirements	Gather, document, and prioritize requirements/use cases of service users. Support the development of use cases that realize TBM value.			A	I	R	C	C
Create User Reports	Take approved use cases and TBM roadmap items and develop reports in alignment with agreed standards.	I	I	A	I	C	C	R
Operationalize Reports	Identify key processes that will benefit from insights derived from the TBM model.	C	C	A	R	R	I	C
Roadmap Development	Manage stakeholders and set the vision for TBM within the organization. Ensure targeted capabilities are introduced according to schedule.	R	R	A	C	R	C	C
Change Management	Identify processes that are affected or invalidated by TBM capabilities and lead change implementations. Communicate changes to the affected teams. Enforce accountability for change and adoption.	R	R	A	R	C	C	
Communications & Knowledge Management	Educate the organization on the value that TBM provides. Communicate the outputs of the TBM program to the organization. Document the learnings and capabilities resulting from the TBM program.	I	I	A	R	C	C	C

Matrix or Distributed samples available TBMCouncil.org

TBMO Skillsets

Both Technical and Financial Expertise are Essential for the TBMO Team

- ✓ Financial Acumen (Capital Expense, Operational Expense, Allocations, Forecasting)
- ✓ Technology Literacy (Infrastructure, Applications, Cloud, etc.)
- ✓ Analytical Skills (Modeling, Visualization)
- ✓ Presentation and Storytelling ability (Converting Data Into a Compelling Business Narrative)
- ✓ Diplomacy (Navigating Politics between IT, Finance and other groups)
- ✓ Leadership

TBM Office – Operational Stages

Foundational Stage

At the foundational stage, the TBMO builds a common language between IT and Finance. This includes standardizing cost models, establishing data integration, and creating transparency around where money is spent. IT and Finance also partner with other departments to ensure IT priorities are aligned with organizational priorities.

Operational Stage

At the operational stage, the TBMO drives efficiency. Leaders gain insights into IT's return on investments (ROI) so the organization can optimize spending. IT is starting to be seen as a strategic business partner.

Strategic Stage

At the strategic stage, the TBMO becomes a trusted advisor. Technology decisions are no longer just about cost — they're about innovation, agility, and competitive advantage. At this level, IT leaders can confidently demonstrate how technology accelerates growth, reduces risk, and fuels transformation.



Change Management Activities

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Change Management Activities

Key Change Management Activities (End-State Driven)

- ✓ Executive alignment, sponsorship, and visible leadership
- ✓ Strategic communications and stakeholder engagement
- ✓ Role-based training and capability building
- ✓ Change impact assessment and readiness planning
- ✓ Stakeholder mapping and influence strategy
- ✓ Culture and mindset alignment
- ✓ Change champion network enablement
- ✓ Resistance management and feedback loops
- ✓ Performance metrics and adoption tracking
- ✓ Reinforcement mechanisms
- ✓ Coaching and leadership enablement
- ✓ Sustainment and continuous improvement planning

Change Management Approach

PREPARE CHANGE

- Ensure **sponsorship** and top-level support
 - Understand goals, vision, and current pain points
 - Extract and apply hard-earned **lessons** from past projects
 - Develop core and initial extended **change team**
 - Identify **stakeholder groups**
 - Create the **case for change**
 - Identify key impacts to the organization
- Develop change strategy and roadmap
 - Understand stakeholder groups and how to engage them
 - Develop **communication and engagement plan**
 - Clearly plan how and where we involve, recognize, and inspire **end-users**
 - Define KPIs for employee experience and adoption
 - Confirm high-impact leadership expectations
 - Align on change impact assessment approach

Discover starting point – understand where you are, what the vision is, and what success looks like.

Develop the strategy to move the organization from current to desired state and engage relevant stakeholder groups.

FACILITATE CHANGE

- Execute the comms and engagement plan
 - Ensure **adoption risk management** is in place
 - Ignite the rest of the change network into action
 - Conduct the **change impact analysis** and plans
 - Assess and measure **change readiness**
 - Develop training enablement plan
- Continue delivering communications and engagements
 - Manage **concerns and any resistance**
 - Celebrate **small wins**
 - Ensure **support system** is activated
 - Enable and support the change network
 - Execute **training** program

Understand the detailed changes and deliver change actions to prepare people for transition.

Measure change readiness and ensure employees are prepared for transition.

SUSTAIN CHANGE

- Continue delivering communications and engagements
- Measure **employee experience and adoption**
- Provide **adoption solution services**
- Celebrate successes and quick wins via **story-telling**
- Align on the change **sustainment and continuity plan**
- Collect, socialize, and share lessons learned

Monitor usage, drive adoption, and celebrate success – make it stick.

DISCOVER

DESIGN

PREPARE

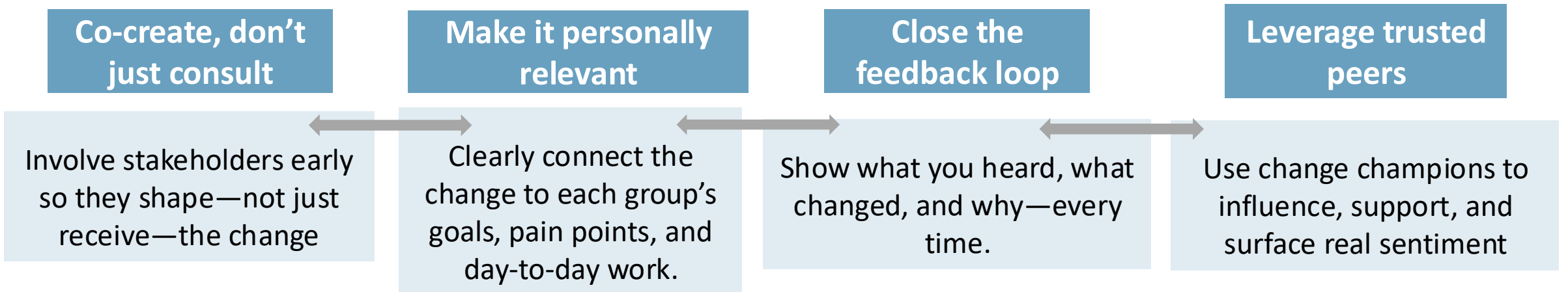
IMPLEMENT

EVALUATE & EMBED

ORGANIZATIONAL CHANGE MANAGEMENT APPROACH

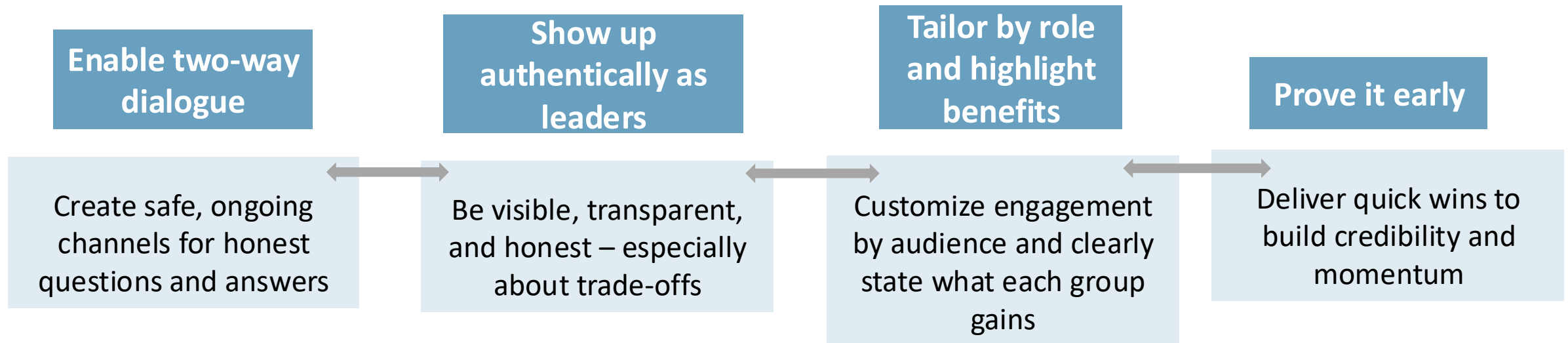
Stakeholder Engagement Techniques

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



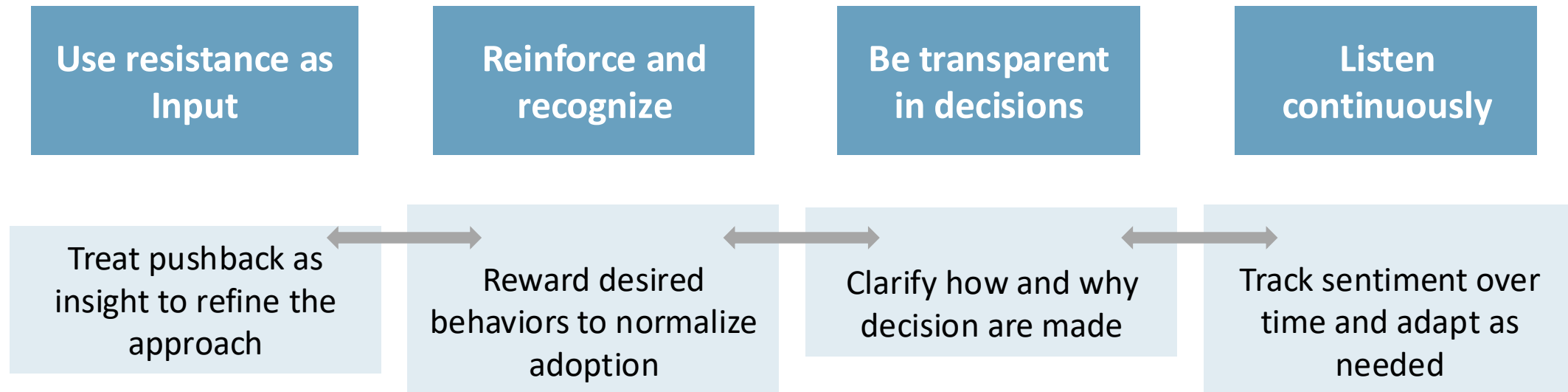
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Surveys

Please take a few moments to fill out the class survey.
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