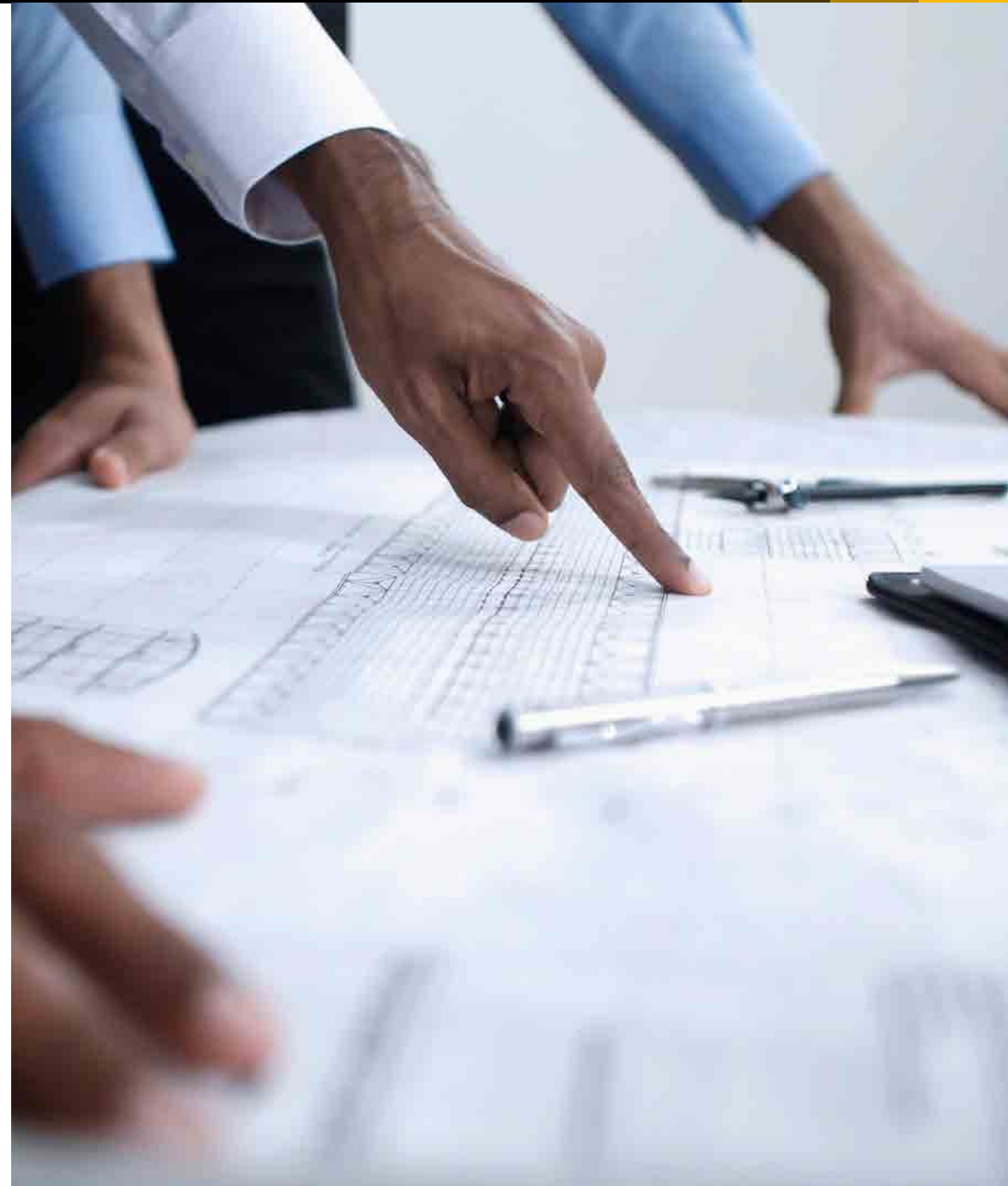# Change Management
Overview

SAP SuccessFactors

Instructions

Use this self-guided deck and workbook to build a formal change management plan. Use this deck to help your team discuss the value of change management as it relates to adoption, and review the high level steps to start defining a plan:
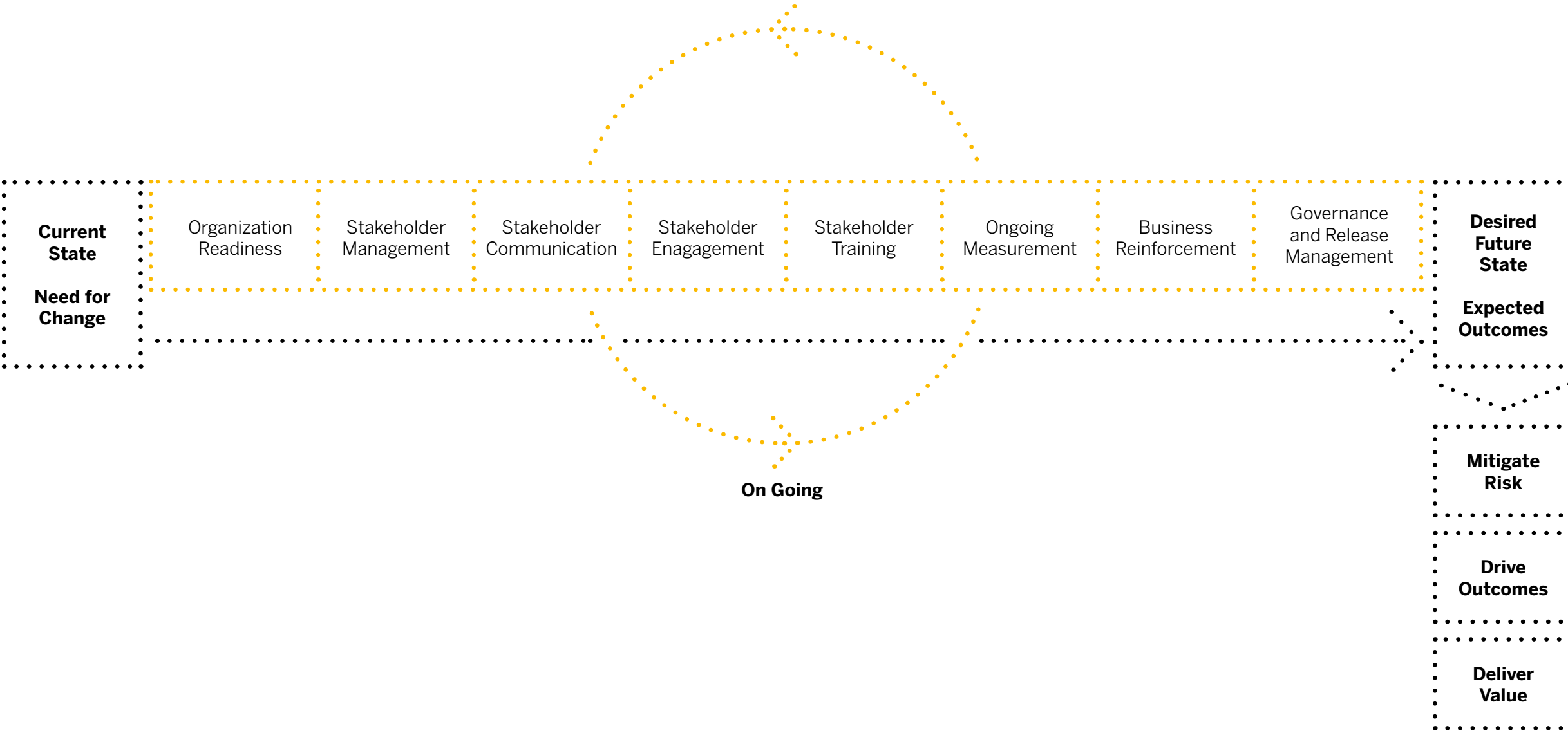
- The first set of slides review the what, why, when, and how of change management. Think about your risk areas, what you do well, and who else should be engaged in planning.

- The second half are to be used in conjunction with the workbook to build a plan. The content provided for each step are examples.

What is Change Management?

*A structured and **ongoing** program that enables an organization to proactively move from current state toward desired state.*

Example: Change Management Approach

Current State

Need for Change

| Organization Readiness | Stakeholder Management | Stakeholder Communication | Stakeholder Enagagement | Stakeholder Training | Ongoing Measurement | Business Reinforcement | Governance and Release Management |

On Going

Desired Future State

Expected Outcomes

Mitigate Risk

Drive Outcomes

Deliver Value

A Change Management Program Helps a Company Proactively ...

- Assess and develop organizational readiness

- Gain executive sponsorship

- Understand impacts of change to stakeholders

- Prepare stakeholders for impacts

- Engage relevant parts of the business

- Train and enable affected teams

- Measure success

- Reinforce positive changes

- Mitigate negative changes

When is it Used?

Change management is a continuous process that can be used to:

- Support culture changes
- Set behavior expectations
- Shift processes
- Define HR operating model and organizational change

- Update policies and procedures
- Plan for mergers and acquisitions
- Implement and deploy technology
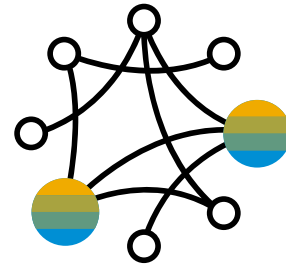- Support stakeholders ANYTIME you are asking them to do something different!

How Do I Start?

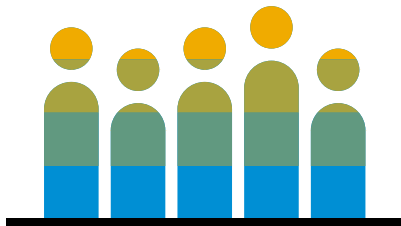Workbook exercises: Advice for the design work ahead, keep it SIMPLE!
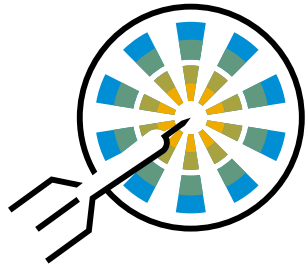
Define **Strategy**

Define **Framework**

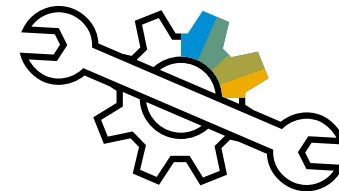**Define** **Processes and Tools**

Define **Roles and Responsibilities, RACI**
(responsible, accountable, consultative, informed)

Define **Tracking and Measurement**

Define **Action Plan**

Define **Strategy**

In your workbook's Strategy tab:

- Draft a **purpose statement** to summarize the program and expectations
- Create **guiding principles** that set consistent, decision-making parameters (non-negotiable) you will use to achieve the strategy
- Develop **goals and outcomes** that outline the key objectives you hope to achieve through the program

Change Management Purpose Statement

To deliver a best-in-class change management program that delivers consistent, efficient, and timely activities that align with the project to ensure organization adoption and reinforcement

Guiding Principles

Timely
All activities will be delivered on time and relevant to the stakeholders

Efficient
Process and tools will be simple to understand, easy to use and measureable

Global
Consider all regional variances when defining stakeholder impacts and adoption expectations

Experience
Deliver a consumable approach across stakeholders and minimize operational disruption

Goals and Outcomes

- Deploy a standard and repeatable change program
- Align communications with broader corporate communications
- Deliver communications through multiple vehicles to address stakeholder consumption needs

- Reduce time and cost on change efforts
- Increase stakeholder understanding
- Increase communication and training vehicles
- Increase user adoption and satisfaction
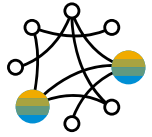
Define Framework

In your workbook's Framework tab, draft a framework that defines your change management programs and scope:

- The framework defines specific programs needed based on the scope of change
- For most technical implementations we recommend the below, but tailor your program to the changes you are making

Change Management Framework

Program	Change Sponsor Sponsorship	Organization Readiness	Stakeholder Management	Communication and Branding	Training	Champion Network	Measure and Reinforcement
Program Scope	Manage executive alignment of priorities for the project	Assess organizational readiness and progress relating to the project	Management of the engagement activities for the stakeholders impacted by project • Executives • Managers • Professional • Non-Exempt • Contractors	Management of development and delivery of communication and branding for the project	Management of development and delivery of training for the project	Management and delivery of a champion network for the project	Track and measure the success of the change (adoption) Management and delivery of reinforcement for the project

Define Processes and Tools

Define the processes and tools needed to execute the change management programs:

- See the following 9 slides for examples of how each process and tool might look
- Use the corresponding tabs in your workbook to develop your own change management tools

Program	Change Sponsor Sponsorship	Organization Readiness	Stakeholder Management	Communication and Branding	Training	Champion Network	Measure and Reinforcement
Processes	• Executive planning • Executive communication • Executive engagement	• Stakeholder discovery • Survey planning, development and launch • Survey evaluation • Survey feedback review	• Stakeholder identification • Stakeholder impact analysis	• Communication planning • Communication development • Communication delivery • Communication measurement	• Training planning, development and delivery • Training measurement	• Champion network planning • Champion identification • Champion engagement • Champion feedback	• Adoption • Release management • Ongoing communication, training and feedback • Reinforcement planning and delivery
Tools	• Executive summary • Executive plan • Communication plan/template • Engagement plan	• Discovery questions and intake • Readiness assessment • Awareness assessment	• Stakeholder analysis • Impact analysis • Stakeholder engagement plan	• Communication plan • Communication vehicles • Communication template • Brand guidelines	• Training plan • Training vehicles • Training template	• Champion plan	• Adoption assessment • Communication plan • Training plan • Feedback intake • Reinforcement plan

Change management framework, programs, and processes must be integrated with the project

Example: Sponsor Summary
High level overview for executives: Build your own in the Sponsor Summary tab in your workbook

Why are we changing?:
In 2016, the executive leadership team initiated a program to reduce operating expense by $20 million dollars.

How are we changing?:
HR has engaged in an intensive review of our organizational model, talent, programs and processes, and technology. HR is recommending a full transformation and will be focusing on a fully integrated approach. We have identified the following areas for efficiency:

People/Skills/Culture
- Shift from a federated model to an organization with consistency and standards
- Employee roles, skills, behaviors and competencies will change to support new business processes and technology
- Employees will have greater access and visibility to information and data
- HR will move from a transactional function to a strategic business partner

Processes
- Integration of business processes and technology will reduce administrative burden and allow for easier access to workforce data across HR, Finance, and IT
- Alignment of functional processes with technology workflows will result in new business policies and procedures, standards, and governance
- The way managers execute on performance management and talent assessments

Technology
- Selected SAP SuccessFactors solution for our HR platform
- Single destination for all HR data and transactions and data
- Provide visibility and access into our total workforce
- Enable talent management processes and delivery visibility into leadership successors
- Improve onboarding of new hires and deliver skill based training

What are the expected outcomes?:
- Increase employee adoption
- Increase employees
- Increase program and process efficiency
- Reduce operating expense

What do we need from the executive team to be successful?:
1. Sponsorship that is visible to the organization, e.g. reinforcement on all hands calls
2. A number of executive champions to be engaged throughout the program
3. The allocation of business leaders, people managers and employees as champions
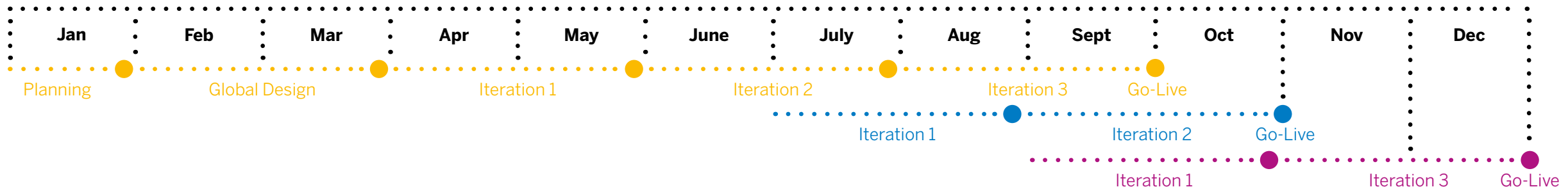4. Commitment to cascade and reinforce key messages and needed actions

Timing:
Jan 2016 – Jan 2017
Phase 1: Employee Central
Phase 2: Recruiting, on-boarding, performance and goals
Phase 3: Compensation, succession

Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec

Planning | Global Design | Iteration 1 | Iteration 2 | Iteration 3 | Go-Live

Iteration 1 | Iteration 2 | Go-Live

Iteration 1 | Iteration 3 | Go-Live

Example: Organization Readiness Scorecard

Illustrates gaps in stakeholder readiness: Build your own in Readiness Assessment tab of your workbook

Stakeholder Group	Project Launch			Iteration 1			Iteration 2			Iteration 3/UAT			Go-Live		
	Awareness of the Change	Understand the Need for Change	Readiness for the Change	Awareness of the Change	Understand the Need for Change	Readiness for the Change	Awareness of the Change	Understand the Need for Change	Readiness for the Change	Awareness of the Change	Understand the Need for Change	Readiness for the Change	Awareness of the Change	Understand the Need for Change	Readiness for the Change
Business Executives	100%	95%	85%	100%	90%	85%	100%	100%	95%	100%	100%	100%	100%	100%	100%
Business Leaders	60%	35%	30%	90%	82%	51%	100%	95%	90%	100%	100%	99%	100%	100%	100%
People Managers	45%	25%	20%	82%	50%	45%	100%	75%	64%	100%	98%	95%	100%	100%	99%
Exempt Employees	25%	0%	0%	60%	20%	12%	100%	60%	53%	100%	95%	79%	100%	99%	95%
Non Exempt Employees	10%	0%	0%	51%	5%	2%	100%	55%	50%	100%	82%	77%	100%	95%	90%

Key: >80% = high - green
50% - 79% = medium - yellow
49% or below = low - red

NB: Data is typically captured through a series of short surveys

Example: Stakeholder Analysis

Outlines all people impacted by change and how: Build your own in the Stakeholder Analysis tab of your workbook

Stakeholder Group	Role Description	Functions	Location(s)	Type of Location	Number of Stakeholders	Level of Impact (Behavior, Process, Tech)	Level of Awareness	Level of Readiness	Sponsor or Influencer or Resister	Areas of Consideration
Business Executives	SVP and Above	CEO, CIO, CFO, COO, CTO, CHRO, Sales	Atlanta New York City	Professional Professional	3 4	High	High	High	Sponsor	Supporting and sponsoring change
Business Leaders	Director - VP (L3-L5)	Operations Sales R&D Finance Accounting Manufacturing Distribution	Atlanta Alpharetta State College Indianapolis Spartanburg	Ops/Sales/Prof. R&D Manufacturing Distribution Distribution	16 6 2 2 2	Medium	Medium	Low	Sponsor	Perception that the MSS will put more burden on them vs. HR
People Managers	Manager (L6) Line manager (L7) Supervisor (L8)	Operations Sales R&D Finance Accounting Manufacturing Distribution	Alpharetta Remote State College Indianapolis Spartanburg	R&D Sales Manufacturing Distribution Distribution	26 45 15 36 42	High	Low	Low	Influencer and Resister	Perception that the MSS will put more burden on them vs. HR
Exempt Employees	Individual contributors (L9-13)	Operations R&D Finance Accounting Manufacturing Distribution	Alpharetta State College Indianapolis Spartanburg	R&D Manufacturing Distribution Distribution	215 34 68 87	High	Low	Low	Resister	Focus on ownership of career Kiosks needed
Non Exempt Employees	Administrative (L14) Manufacturing (L14 - L20) Distribution (L14 - L20)	Operations or Admin R&D Manufacturing Distribution	Alpharetta State College Indianapolis Spartanburg	R&D Manufacturing Distribution Distribution	127 101 193 217	High	Low	Low	Resister	Language barriers Technology skills Kiosks needed

Example: Impact Analysis

Summarizes key changes for each stakeholder group: Build your own in the Impact Analysis tab of your workbook

Stakeholder Group	Process	Process Impact	Technology	Behavior	Communication Themes	Training Focus	Additional Areas of Consideration
Business Executives	Requesting a Requisition	1. Position mgmt approach 2. Approval level (5 -> 2)	1. People managers will be responsible for completing requisition request through MSS 2. System will require position specifications tied to organization 3. Only position aligned to organization can be requested	1. People managers will be responsible for requesting open position through MSS	1. Position management 2. Manager accountability	1. Position management 2. Level of approvals 3. System notifications 4. HR's role	1. Mobile request 2. Mobile approvals 3. Delegation 4. Dashboard
Business Leaders	Requesting a Requisition	1. Position mgmt approach 2. Approval level (5 -> 2)	1. People managers will be responsible for completing requisition request through MSS 2. System will require position specifications tied to organization 3. Only position aligned to organization can be requested	1. People managers will be responsible for requesting open position through MSS	1. Position management 2. Manager accountability	1. Position management 2. Level of approvals 3. System notifications 4. HR's role 5. Requesting a requisition through MSS	1. Mobile request 2. Mobile approvals 3. Delegation 4. Dashboard
People Managers	Requesting a Requisition	1. Position mgmt approach 2. Approval level (5 -> 2)	1. People managers will be responsible for completing requisition request through MSS 2. System will require position specifications tied to organization 3. Only position aligned to organization can be requested	1. People managers will be responsible for requesting open position through MSS	1. Position management 2. Manager accountability	1. Position management 2. Level of approvals 3. System notifications 4. HR's role	1. Mobile request

Example: Communication Plan
Build your own in the Impact Analysis tab of your workbook

Project Phase	Project Event	Key Message	Key Stakeholders	Vehicles	Date
Phase 0	Project launch	What's coming, when is it coming, what does this mean for you?	Executive, people manager, employee, HR	E-mail, collaboration site …	xx/xx/xxxx
Mid Project	User acceptance testing	Project update, upcoming events, value to you?	Executive, people manager, employee, HR	E-mail, collaboration site …	xx/xx/xxxx
Project Launch	End user training	Prepare for launch, training invitations will be …	Executive, people manager, employee, HR	E-mail, collaboration site …	xx/xx/xxxx
Project Launch	Go-Live	We are proud to announce the launch of …	Executive, people manager, employee, HR	E-mail, collaboration site …	xx/xx/xxxx

Example: Training Plan
Build your own in the Training Plan tab of your workbook

Project Phase	Project Event	Training Description	Key Stakeholders	Vehicles	Date
Phase 0	Project team training	System fundamentals	Project team	E-mail, calendar invite	xx/xx/xxxx
Mid Project	User acceptance training	Training for user acceptance participants	Champions	E-mail, calendar invite	xx/xx/xxxx
Project Launch	End user training	User training	Executive, people manager, employee, HR	E-mail, calendar invite	xx/xx/xxxx

Example: Champion Plan

Build your own in the Champion Plan tab of your workbook

	Key Activities	Owner	Timing and Frequency
	Champion Nomination • Business leaders • People manager/advisor	Change team	5/12 - 5/19
	Kick off and SAP SuccessFactors Demo	Change team	5/26 - 6/2
	Prototype 2 Review	Change team	TBD
Champion	Ongoing Practice Activities • Lunch & Learn (pre recorded demo/video) • Deliver project updates • Socialize internally to peers	Change team	TBD
	UAT Participation	Change team and technical team	7/28 (?)
	Train the Training Participation (select group)	Change team	8/18 (?)
	Support User Training (select group)	Change team	9/1 - 9/22
	Super User - Tier 1 Support (select group)	Change and HRIS team	Ongoing

Example: Measurement and Adoption Plan

Activity	Timing	Metrics Focus
Readiness Focus Group	First 30 days; small portion of the population	Understanding of organizational readiness, challenges, considerations
Readiness Survey	First 30 days of engagement	Understanding of organizational readiness, challenges, considerations
Awareness Survey	Within 5 days of communication launch	Measure effectiveness of communication; is it being read and understood?
Engagement Effectiveness Survey	Every other month throughout engagement	Measure effectiveness of champion program; is it driving awareness?
Training Effectiveness Survey	Within 5 days of training delivery	Measure effectiveness of training program; • Training delivery effective? • Training content effective? • Training assets effective?
Reinforcement and Adoption Effectiveness Survey	90, 180, 360; bi-annually post deployment	Measure effectiveness of the reinforcement and adoption program; • Are managers reinforcing the change? • Are managers reinforcing accountabilities and responsibilities? • Is the change being adopted based on desired outcomes?

Example: Reinforcement Plan
Build your own in the Reinforcement Plan tab of your workbook

Activity	Timing	Business Action	Metrics Focus
Goal Setting	Dec 15 – Jan 15	1. Business executives send internal e-mail reinforcing employees to enter goals 2. Business leaders reinforce the need for people managers, line managers and supervisors to ensure all employees have goals in by December 31st 3. Direct people managers meet with employees to discuss organizational goal alignment, business goal alignment, and personal goals	100% goal completion by January 15

Performance Reviews	Jan 15 – May 1	1. Business executives send internal e-mail reinforcing the need to have frequent goal discussions with employees
		  • Business executives establish a cadence with business leaders to review goals
		2. Business leaders reinforce the importance of frequent goal discussions with employees, people managers, line managers, and supervisors
		  • Business leaders establish a cadence with people managers, line managers, and supervisors to review goals
			Performance Process Survey

Define Roles and Responsibilities

- In your workbook's Role ARCI and Role Model tabs, define the roles and responsibilities required to execute change management processes

- See next two slides for examples

Program	Change Sponsor Sponsorship	Organization Readiness	Stakeholder Management	Communication and Branding	Training	Champion Network	Measure and Reinforcement
Roles	• Change sponsor(s)	• Global change lead • Regional change resources	• Global change lead • Regional change resources	• Global comms. lead • Regional comms. resources • Marketing lead	• Global training lead • Instructional designers • Regional training resources	• Global champion lead • Regional change resources • Business champions	• Global change lead • Regional change resources
Responsibilities	• Manage executive communication and engagement	• Define and execute the global change strategy; measure readiness	• Define and execute the global stakeholders; define change impacts	• Define and execute the communication and branding strategy	• Define and execute the global training strategy	• Define and execute the global change network	• Manage adoption measurement, reinforcement, communications and training

Change management resources should be included in the implementation resource model

Example: Roles and Responsibilities

Role	Pre Implementation and Implementation	Post Implementation
Change Sponsor(s)	Drive sponsorship and support	Execute and measure progress; maintain sponsorship of key executives; support governance process
Global Change Lead	Develop change strategy and execution of change program	• Develop global change management strategy, approach; support governance process • Execute, manage, and measure change progress • Identify future change implications and develop plans to address, i.e. releases
Regional Change Lead and Change Resources	Localize change strategy and approach of change program by region	Execute, manage, and measure change progress, e.g. communications, training, etc.
Global Communications and Branding	Develop communications and branding approach and plans and execute	• Develop global communication approach and curriculum • Execute, manage, and measure communication progress • Identify future communications implications and develop plans to address, i.e. releases
Global Training Lead	Develop training approach and plans and execute	• Develop global training approach and curriculum • Execute, manage, and measure training progress • Identify future training implications and develop plans to address, i.e. releases
Instructional Designers	Partner with the SMEs to develop training material	Partner with SMEs to update any training material based on program, process, technology and changes, etc.
Regional Trainers	Localize training content, where applicable; deliver training courses and may be required to provide on going support	Localize training content, where applicable; deliver local training and support on going change
Change Champion(s)	Engage in key change updates and socialize the change; may be required to support localized training delivery and on going support	Engage in key change updates and socialize the change; may be required to support localized training delivery and on going support

Example: RACI Roles and Responsibilities
(RACI = responsible, accountable, consultative, informed)

Process Activity	Change Sponsor	Change Lead	Change Resource	Comms. Lead	Comms. Resource	Branding Lead	Training Lead	Instructional Designer
Executive Planning	A, R	C	I	I	I	I	I	I
Executive Communication	A, R	I	I	C	I	I	I	I
Executive Engagement	A, R	C	I	C	I	I	C	I
Stakeholder Discovery	R	A	R	I	I	I	I	I
Survey Planning	C	A	R	C	I	C	C	I
Survey Development	C	A	R	C	I	C	C	I
Survey Launch	I	A	R	C	R	C	I	I
Survey Evaluation	I	A	R	I	I	I	I	I
Executive Planning	A, R	C	I	I	I	I	I	I
Executive Communication	A, R	I	I	C	I	I	I	I

Define Tracking and Measurement

Define how you will measure program success

Measurement			
HR Goal	HR Outcome	HR Target	Progress
• Deploy a standard and repeatable change program	• Reduce time and cost on change efforts	• Reduce cost and effort by 30%	
• Align communications with broader corporate communications	• Increase stakeholder understanding	• Increase early understanding across stakeholder to 80% by end of phase 1	
• Deliver communications through multiple vehicles to address stakeholder consumption needs	• Increase communication and training vehicles • Increase user adoption and satisfaction	• Increase communication vehicles by 70% • Increase user adoption by 40% • Increase user satisfaction to 97%	

Action Plan: Identifies activities, owners, and a target date

Develop an action plan to finalize your change management program

Action Plan

HR Goal	Activity	Activity Description	Owner	Resources	Due Date
• Deploy a standard and repeatable change program	1. Change Management Program design	• Design change management model strategy, programs, processes, and outline technology needs	\<name\>		
• Align communications with broader corporate communications	2. Integrate project and corporate communication plan and messaging	• Design communication approach • Design communication plan • Integrate plans and messaging	\<name\>		

SAP SuccessFactors

Well Done!

Now move ahead with confidence as
you prepare for change!

SAP