



The Project Academy Series:

Understanding and Implementing Organizational Change Management

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Welcome and Introductions

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Agenda

- Objectives
- What is Organizational Change Management (OCM)?
- The Human Factor at Organizational Level
- Where do you start?
- Fundamentals, Tools, and Templates
- Wrap-Up
- Questions





Objectives

- **What Is OCM?**
 - Why It Is Important
 - The Human Factor
 - Organizational Goals and Objectives
- **Recognize the 5 Pillars of Successful Change**
- **Utilize OCM Tools and Templates**



Cross Your Arms





Organizational Change Management

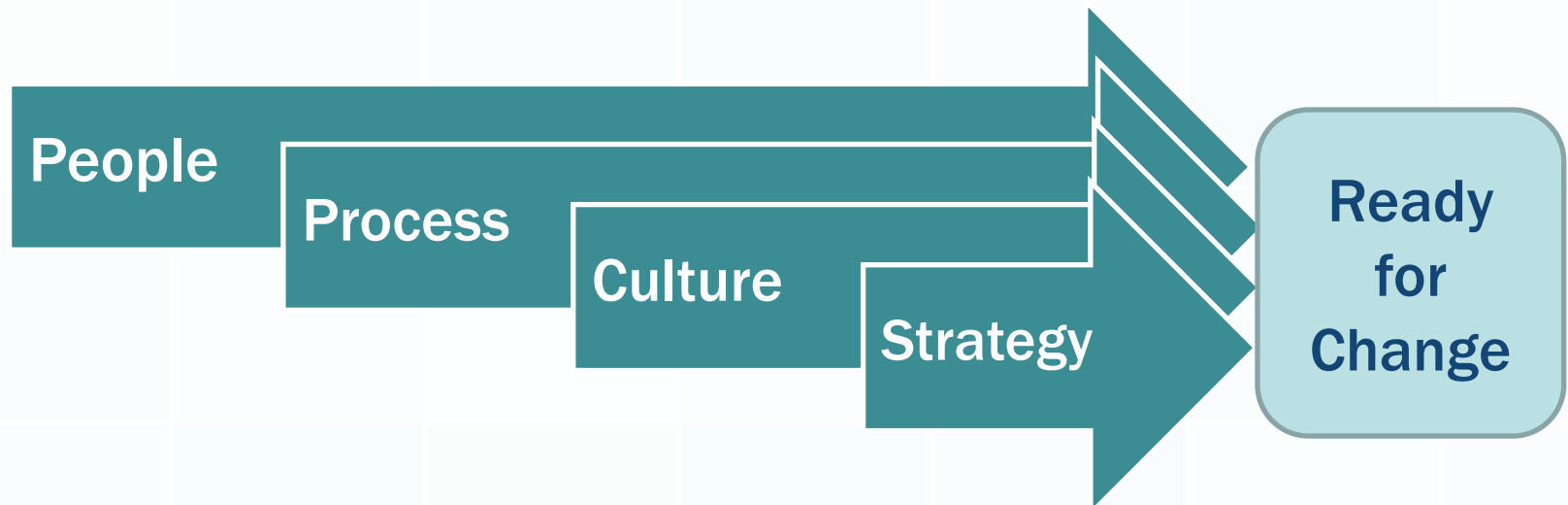
- What is it?
- Why is it important?
- Five Pillars of Successful Change





Organizational Change Management

- Organizational Change Management is an approach to transitioning an organization including its people from their current state to a new state.





Organizational Change Management

■ Why is it important?

- Organization can drive better performance and amp up business results through effective change management.
- Leading change is an important part of a leader's job.
- Top 5 Organizational Change Challenges:
 1. Resistance from the people who need to change
 2. Navigating the political landscape
 3. Addressing team dysfunctions
 4. Difficult conversation/coaching/feedback to senior leaders
 5. Dealing with ambiguity, uncertainty, inability to forecast the future



5 Pillars of Successful Change

- Communication
- Sponsorship
- Stakeholder Management
- Readiness
- Training and Turnover





How Does OCM Fit Into Your Business Goals and Objectives?



Bringing Strategy to Life...



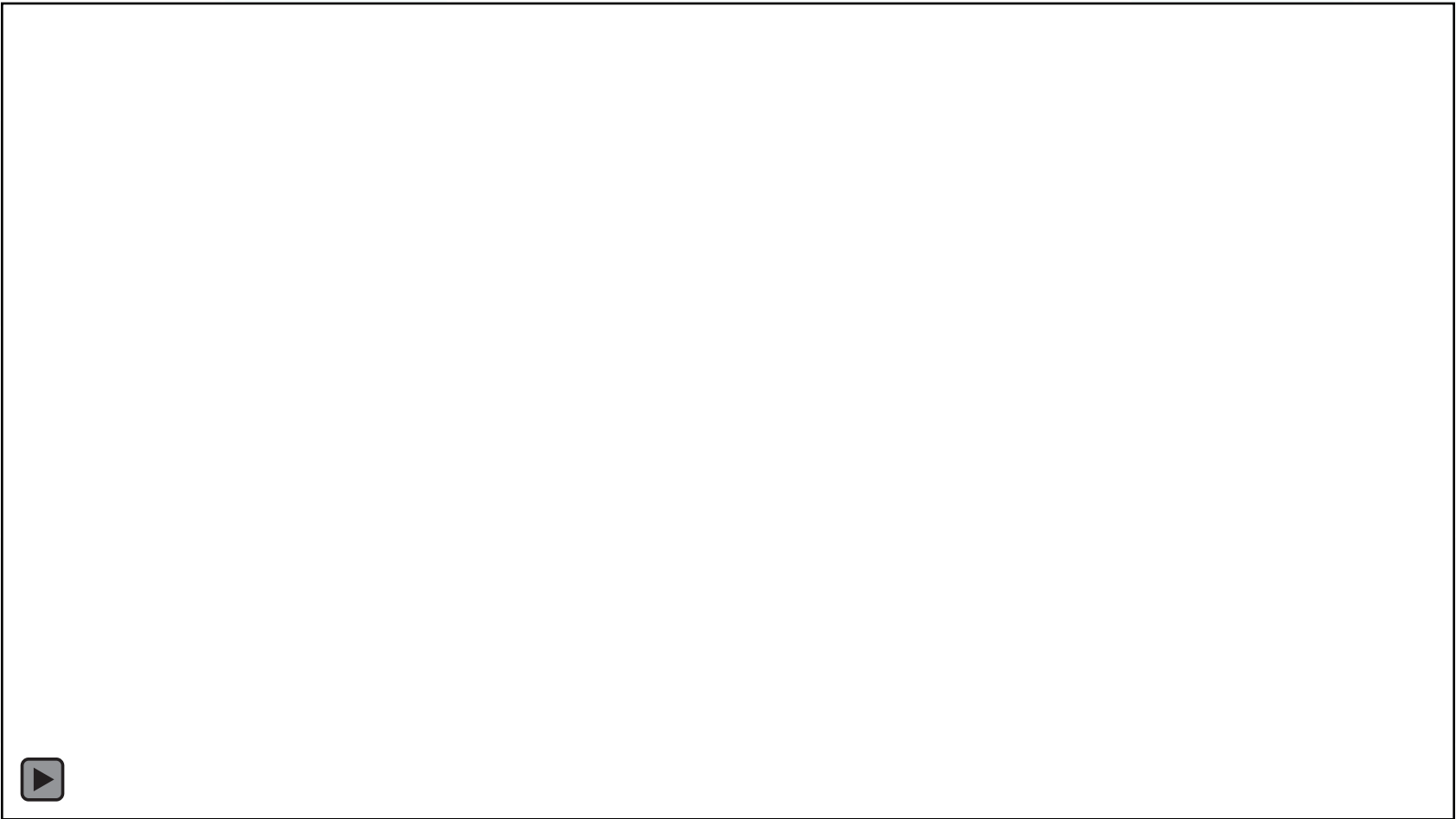
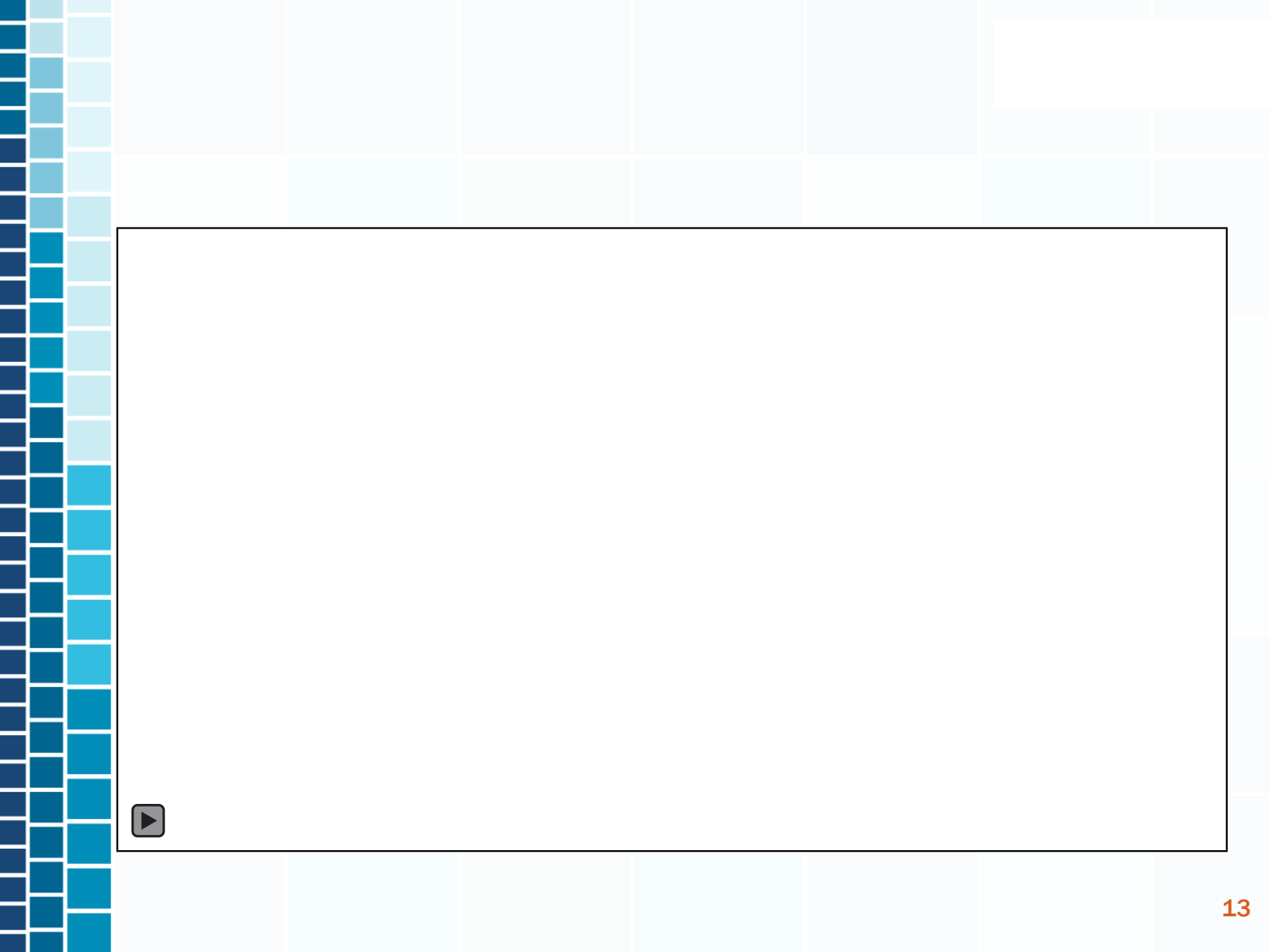
Cultural Alignment: Making It Real

- What defines an organization's culture?
- Culture generally refers to the shared set of values, principles, assumptions, beliefs, symbols and behaviors that reflects how work gets designed and executed. In short, it's "how things are done around here." Of course, no two organizations' cultures are exactly alike.



What makes up a organization's cultural profile?

- In other words what makes an organization successful?
- Efficiency, Quality, Innovation, Customer Service, Company Image





Human Side of Change – People

- By creating **Awareness** you define the problem and create a common understanding.
- Understanding creates the **Desire** to fix the problem, establishing ownership.
- Ownership drives the **Knowledge** to find a solution.
- Owning solutions leads to **Acceptance** of change.
- Acceptance leads to **SUCCESS!**
- **Success with the PEOPLE who influenced the Change!**
- **REINFORCE** through awareness and training, even after your project has ended.



OCM at Organizational Level



Source: Gartner (October 2010)

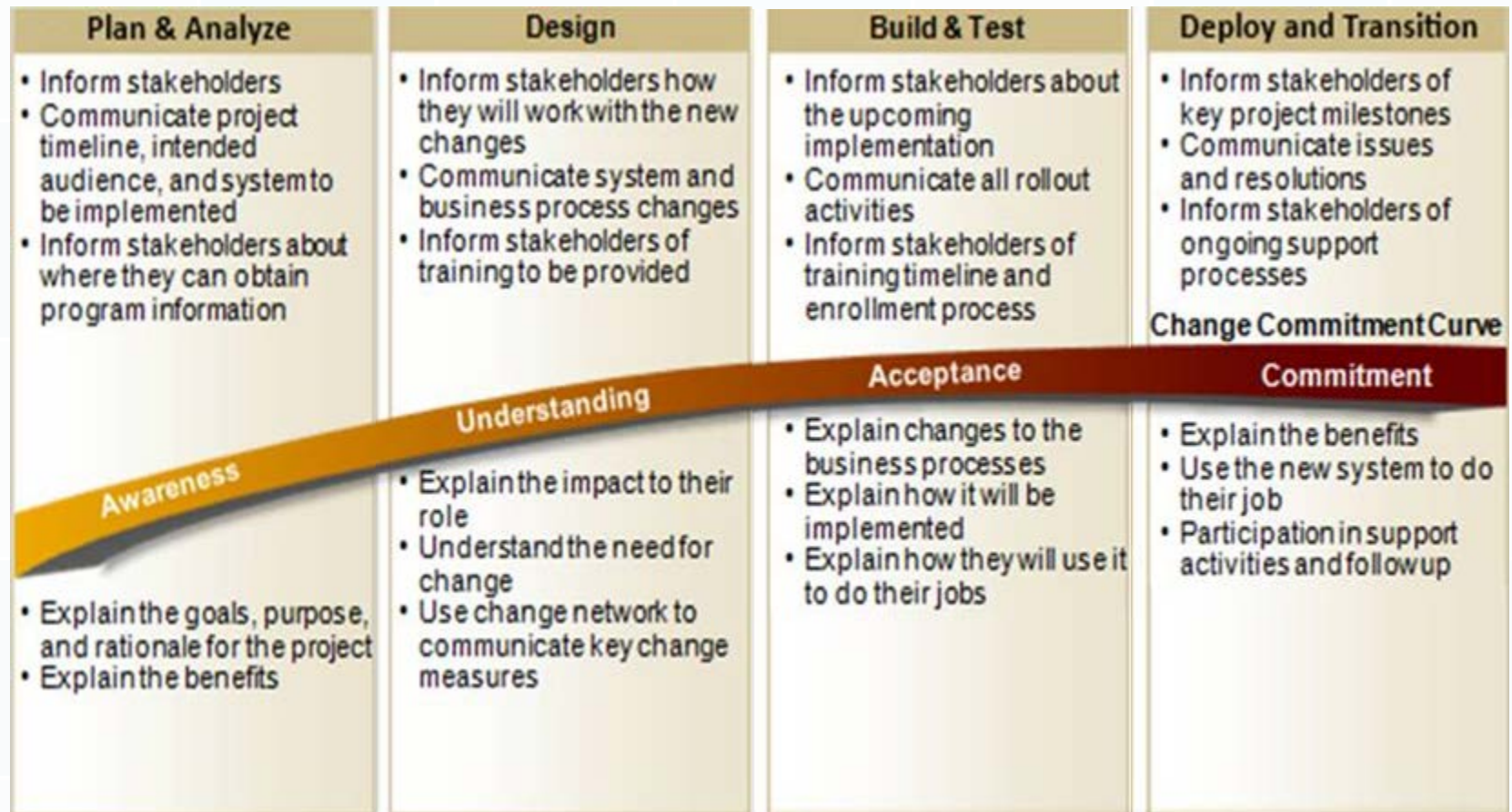


Where Do You Start?





Stages of Change





Project Work Plan (OCM WBS)

Templates\Sample OCM Project Schedule
2007 Version.mpp



Strategy: Aligning OCM Lifecycle with Project Lifecycle

1. Preparing
2. Managing Planning
3. Managing Executic
4. Transition
5. Monitoring





Change Readiness Assessment

- Why is it important?
- What does it tell you?
- Best Practices





Why Is It Important?

- Culture and value system
- Capacity for change
- Middle management's predisposition toward the change
- Employee readiness for change



Change Readiness Assessment

Readiness Assessment

HOW READY ARE YOU FOR CHANGE? WHAT CAN YOU DO TO IMPROVE?

Instructions:

This Readiness Assessment assists you in evaluating your readiness for change. It may be used in several ways:

Readiness Assessment

HOW READY ARE YOU FOR CHANGE? WHAT CAN YOU DO TO IMPROVE?

teams.

Assessment Scoring

1. Project Manager/Change Manager leading the change effort should take this assessment from an organization perspective, not from his/her individual perspective.

**1=Strongly Disagree, 2=Disagree, 3=Neutral,
4=Somewhat Agree, 5=Agree, 6=Strongly Agree**

your organization's ability to manage change. Responses are interpreted as follows:

**1=Strongly Disagree, 2=Disagree, 3=Neutral,
4=Somewhat Agree, 5=Agree, 6=Strongly Agree**

Response



Exercise – 10 Minutes





Instructions

- Think of a change initiative your organization needs to implement.
- Take the assessment individually based on your role in your organization.
- There are 5 short questions for each of the five Pillars.
- Enter a response that best represents your organization's ability to manage change.



Things to think about when filling out the assessment

1. How well does your organization function during change efforts?
2. How well positioned is the organization to be able to absorb all the changes planned without creating significant risk of overload in affected areas?
3. What are the resources involved and what is their degree of skills and experience?
4. What is your leadership's capability of sponsoring and supporting change?
5. What generates desire for the change and what creates resistance to it?
6. What do you need to improve support and reduce roadblocks for the change?
7. What is your corporate culture and historical experience in dealing with change?



What does it tell you?

- Average score is calculated at each Pillar
- Risks and potential obstacles
- Gaps in communication, training, sponsorship, and transition strategy required to implement change
- Special Tactics needed to support and sustain change



What do you do with the results?

- If your average score is below 4 for any of the categories, this indicates the organization is not fully prepared and should spend efforts on that pillar to improve readiness.
- Develop strategies to address areas that need improvement.
- Select a change management team model and team size.
- Select a sponsorship model and support system.
- Customize communication plans, training plans, coaching plans and sponsorship activities.



Best Practices

- Change management team or project leaders use the assessment as a tool to assess the organization's readiness to change.
- Independent vs. Third Party
 - Agile, flexible
 - Unbiased opinion
- Include employee and manager interviews and surveys. When collecting data from a large number of employees, focus groups can also be used in place of one-on-one interviews.



Best Practices (Continue)

- Use it to plan your change management strategy and help the project team make informed decisions to managing change.
- Use it as a planning aid and not as the bulk of the change management effort.

Break - 15 Minutes





OCM Fundamentals, Tools, and Templates

- OCM Methodologies
- OCM Strategies
- Five Pillars of Change





Common Methodologies

■ PROSCI/ADKAR



<http://www.prosci.com/adkar-model/overview-3/>



Organizational Change Management

Dive Deeper

OCM REFERENCES, YOU CAN'T READ JUST ONE

Below are some resources and best practices material for your organization to dive deeper into the subject of Organizational Change Management.

Gartner Reference Materials (www.gartner.com)

- Organizational Readiness Guidelines for BPM
- Getting started With BPM, Part 1: Assessing Readiness
- Getting Started With BPM: Are You Ready?
- 10 Best Practices in Organizational Change for Project Managers
- Gartner IT Score

Maturity Assessments and Models

- Who's Ready for Whole System Change? - http://proactionassociates.com/site_ProAction/section_publications/PDFs/PRO_article_WhosReadyChangeReadinessChecklist.pdf
- OCM Maturity— https://www.change-management-institute.com/sites/default/files/CMI%20White%20Paper.%20Change%20Agility%20-%20Feb%202012_1.pdf
- Prosci OCM Maturity <http://www.prosci.com/ecm1/maturity-audit/>

Methodology Research and OCM Best Practices Research

- Prosci / ADKAR <http://www.prosci.com/>
- Free Management Library <http://managementhelp.org/>
- Free Change Management Strategies http://www.nichols.us/four_strategies.ppt





Five Pillars for Successful Change

1. Communication
2. Sponsorship
3. Stakeholder Management
4. Readiness
5. Training





Communication

- **Communications Strategy and Plan**
- **Establish audience groups**
- **Tailor your messaging**
- **Use multiple delivery channels**
- **Be visible**



[Templates\OCM-Communications-Plan.doc](#)



Executive Sponsorship

- Sponsors build commitment
- Have Competing priorities
- Decision makers
- Sponsor Meetings
- Establish Directives / Policies
- Champions the effort

[Templates\OCM-Change-Leadership-Review.doc](#)



Stakeholder Management

- **Conduct Stakeholder Impact Analysis**
- **Actively engage your partners and commit to a partnership.**
- **Understand the reason, need and benefits of change.**
- **Address the concerns**

[Templates\OCM Stakeholder Map.docx](#)



Readiness

- **Assess your organization's readiness before implementation**
- **People, Culture, Processes, Strategic Alignment**
- **Establish a Change Team**
- **Celebrate success and early wins**



Training and Transition

- Establish a comprehensive training plan
- Train your leaders and change agents in OCM
- Training Needs Assessment
- Identify roles and skill building requirements
- Transition Plan
- Reinforce and encourage learning



Wrap-Up

- Be ahead of Change, OCM starts at the BEGINNING
- Assess your organization's readiness for change
- Incorporate the Five Pillars of Successful Change
- Understand the human factor of change...the people



The Readiness Guides

- Project Readiness Guides

<http://www.cio.ca.gov/opd/itla/itla-21.html>





Questions

