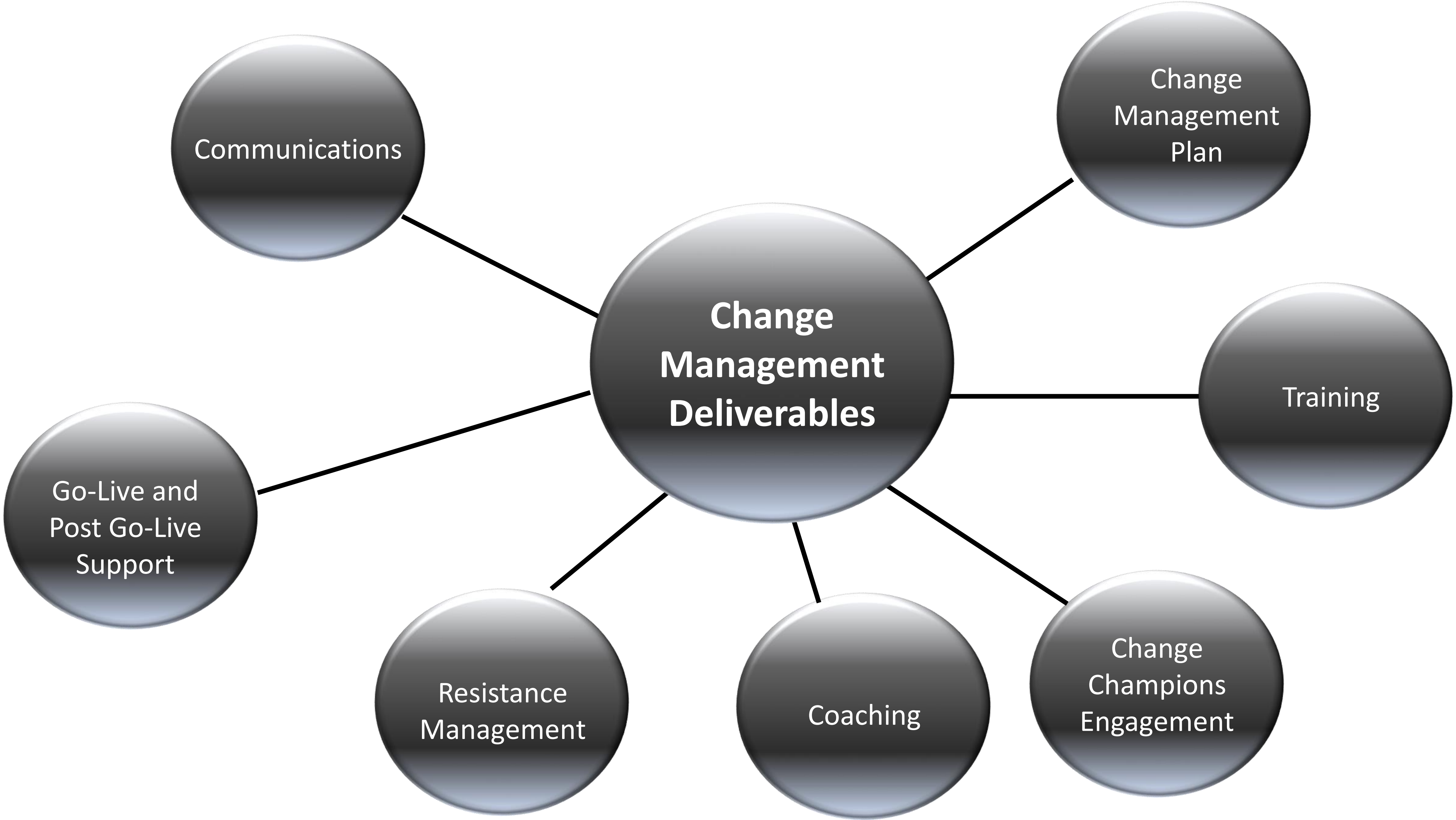
Change Management Playbook

Change Management

What are the Benefits of Change Management?

- Increase adoption of new business processes, solutions, systems, policies, and skill sets
- Minimize resistance
- Increase engagement with stakeholders and impacted users
- Prepare the organization for the future state
- Create consistency and efficiencies in approach
- Increase likelihood of project success
- Facilitate stakeholder and leadership engagements

What Does Change Management Mean for Your Project?



Notes for Project & Change Practitioners

The **next 3 slides** provide you with key notes for using and editing this change playbook to meet your change management and project needs

Delete This Slide After Reading

As pioneers of best change management practices and methodologies, we believe in supporting the change management community where possible, including developing and offering free templates, playbooks and toolkits like the one below.

This playbook is designed for Change Managers, Project Managers, Program Leads, HR, and anyone that is leading or supporting organizational change management activities.

Throughout this document, we will use the "lightbulb" icon to highlight notes that you should review. DELETE these notes (along with the lightbulb) after reading

Note:

Use this document as you see fit. We have no restrictions on usage. We created it for you.

Delete This Slide After Reading

Note: The scale of your change management plan and activities will be driven by the severity of the impacts from the business change that you are driving change management for. A bigger impact will require more change management (for example, more communications and engagement), and this should be reflected as part of your plan .

After using this document to develop your change management plans, you can also use it for one or more of the following activities.

- For sharing and socializing with project team members, sponsors and stakeholders for feedback and buy-in on change management activities
- To provide a readout on your change management impact assessment, target audience analysis and stakeholder assessment
- To introduce the OCM team / working group
- To outline your OCM objectives and scope for the initiative
- To familiarize stakeholders on the benefits of a well-structured change management process
- To outline and socialize your change management strategies and plans for
    - **Communicating** with stakeholders, business units, and impacted employees
    - **Engaging** with stakeholders, business units, and impacted employees
    - Developing, implementing and tracking **training**
    - **Sustaining** the transformational change
    - And many more

The following slides provide a shell of a Change Management Strategic Playbook.

These slides are designed to be edited by YOU and used as your own change management strategy playbook

Change Management Strategic Playbook

People, Processes, Tools, and Policy Changes,

CONTENT

Executive Summary

Enter your content between the “< >” areas at left. Delete the sample image below (right-side of page) and this note.

The Program at a Glance

Overview of the Program (What is It?)

<Provide a brief overview of the program. What is the program about?>

Problem Statement / Issues

<At a high-level, describe the issues the program is intended to resolve.>

What is Changing or What are the Solutions?

<What solutions will the program implement that will resolve the problem statement? What are the program’s objectives? Intended outcomes?>

What is the Value?

<Describe the value the program implementation will bring to your organization. i.e. cost savings? Improved business continuity?>

Example:

What is it?

- New market where the firm is trying to compete and grow. We need to shift our current processes and technology to allow the firm to deliver value in this new market.

What’s changing?

- How we sell, who we sell to and what we’re selling will all change
- Defined process for DSG CTO – including standardized list of configurations for customers
- Fundamental shift to supply and demand. Deal driven demand vs finished goods.
- Post Sales Support and delivery services will be new
- More automated processes in Engineering

What’s the value?

- Ability to scale DSG CTO for Intel is a business imperative
- Increase our value in the Data Center market by offering a complete solution
- Enable new business growth

Change Management Working Group

Use this slide to communicate your OCM Working Group plan. Edit where needed. Delete this note.

An Organizational Change Management (OCM) Working Group will be created, which will include members of the program team (Project Managers, Program Managers, Architects, and other resources).

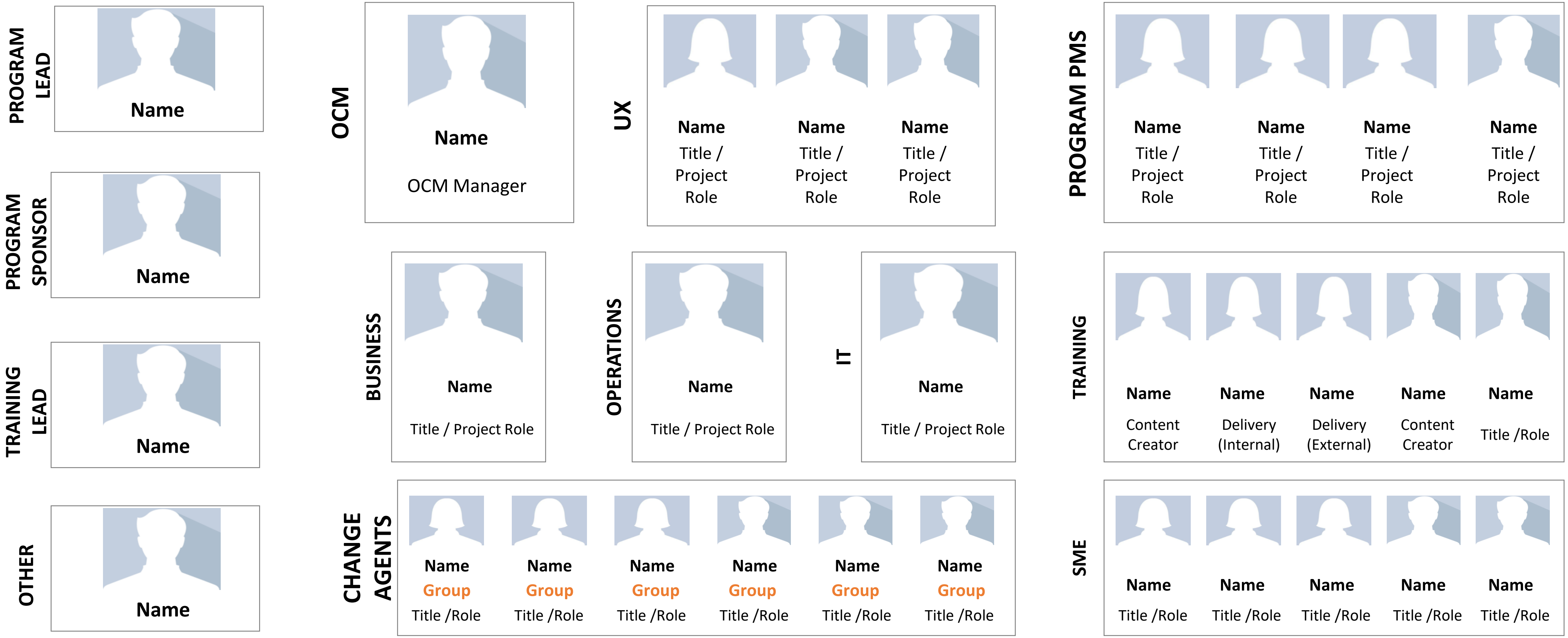
In general, the roles and responsibilities for the group will include:

1. Participating in change management planning and execution:
   - Awareness email communication
   - Program review presentations to organizations and groups across the company
   - Roadshows (In person or virtual) to educate impacted groups on the impacts
   - Training
   - Go-live preparations
   - Post go-live change reinforcement
2. Provide input on developed change management tools
3. Review and provide feedback on change management plans and deliverables
4. Help conduct change impact assessments
   - Manage and conduct AS-IS product data process flow mapping
   - Perform business process impact assessments (AS-IS vs TO-BE)
5. Support the OCM Lead/resources in remediating resistance
6. Help in connecting OCM Lead/resources with key resources, leaders and managers

Change Management Working Group

Enter the names, titles, and pics (if available) of your OCM Working Group on this slide. Delete the instructions above the user placeholders. Delete this note

Note: It is recommended that you stand up an OCM Group for your project to help design, develop and implement activities and deliverables. This group will include members of the transformation team (Business Project Managers, Program Managers, IT Project Managers, Architects, UX, Change Agents) and other resources that might be needed to help implement change management deliverables.



Change Management Working Group (Roles & Responsibilities)

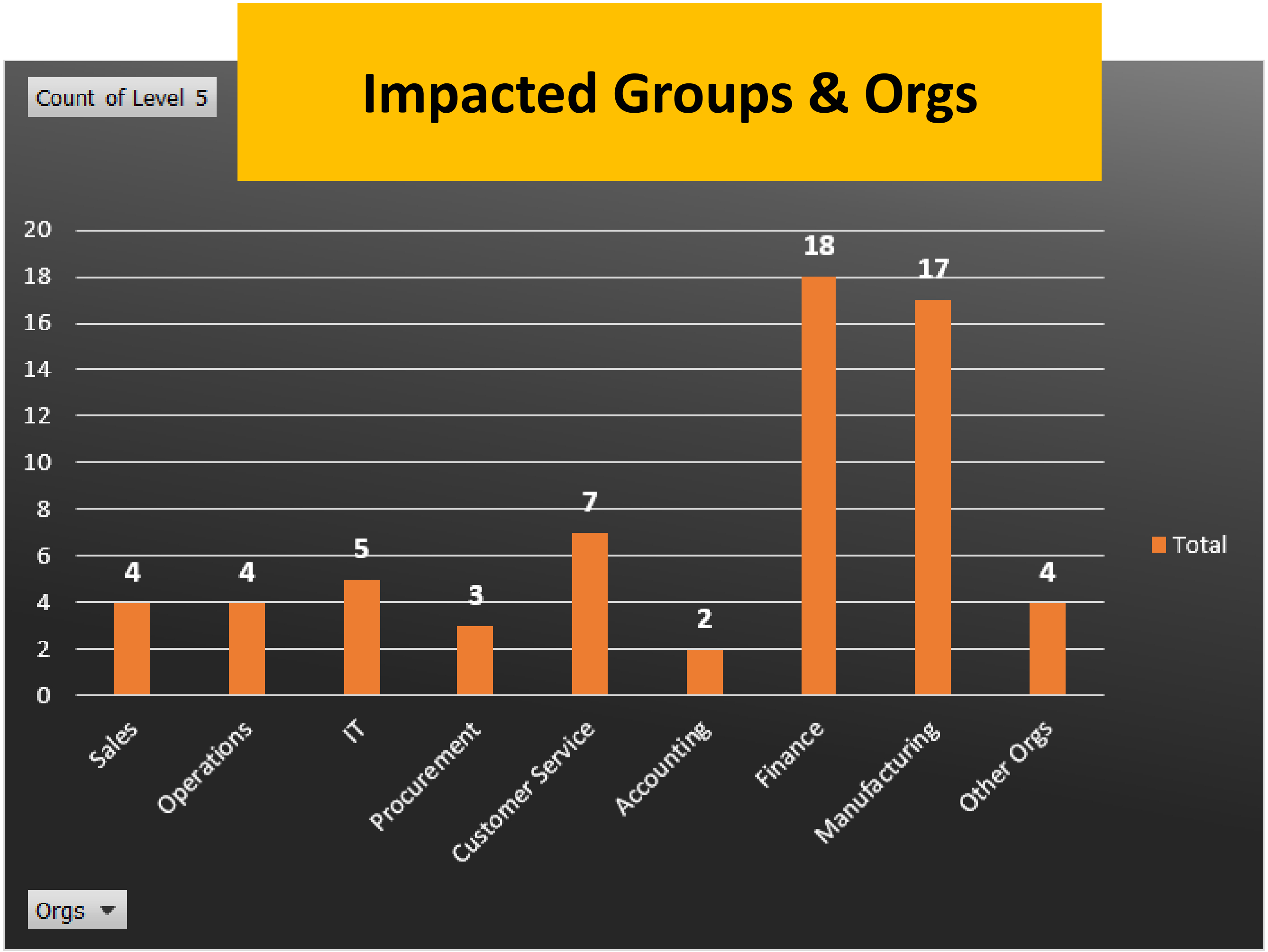
Leads	Working Group Roles
Change Management Lead	Drives change management direction, develops end-to-end OCM strategy, creates communication, training, coaching, engagement and other OCM plans. Executes OCM plans, and works with program teams, SMEs, and other resources to ensure a successful execution
Change Management Resource	Support Change Management Lead in developing and executing OCM tools, deliverables, and plans
Project PMs, SMEs, Designers, Architects	1. Participates in change management planning 2. Provides input on developed change management tools, plans, and deliverables 3. Supports training delivery
Business Analysts	1. Map AS-IS process flow and TO-BE process flow 2. Training content creation and training delivery 3. Document TO-BE business process design. Lead AS-IS vs TO-BE gap analysis. Capture and summarize TO-BE business process change impacts 4. Write and execute test scripts
SMEs (Subject Matter Experts)	1. Draw on AS-IS subject matter expertise to inform the team on TO-BE business process design 2. Help validate requirements, user stories, and test cases/user acceptance criteria 3. Provide input on TO-BE business process design 4. Participate in and execute UAT (user acceptance testing), if involved. Participate in sprint demo/iteration reviews, if involved 5. Assist OCM leads and team in championing changes. Understand impacts to stakeholders and update corresponding documentation. 6. Assist with testing/migration/validation
UX (User Experience)	1. Conduct end-user usability testing (ease of use / user experience)
Sponsors	1. Program management champion and sponsor to their greater organization. Endorse OCM communications and plans 2. "manage management" of affected organizations, help remove roadblocks.
Stakeholders (Impacted Managers)	Champion and represent changes to their overall organization. Validate training needs and partner with OCM team to ensure appropriate communication and training
Stakeholders (Sr. Leaders)	Champion and represent changes to their overall organization

Impacted Groups

Insert an image or a table of your impacted audience into this slide and delete the sample below. Delete this note.

SAMPLE (Replace with yours)

Orgs	Sub Groups Total
Sales	4
Operations	4
IT	5
Procurement	3
Customer Service	7
Accounting	2
Finance	18
Manufacturing	17
Other Orgs	4
Grand Total	**64**



Communication Target Audience

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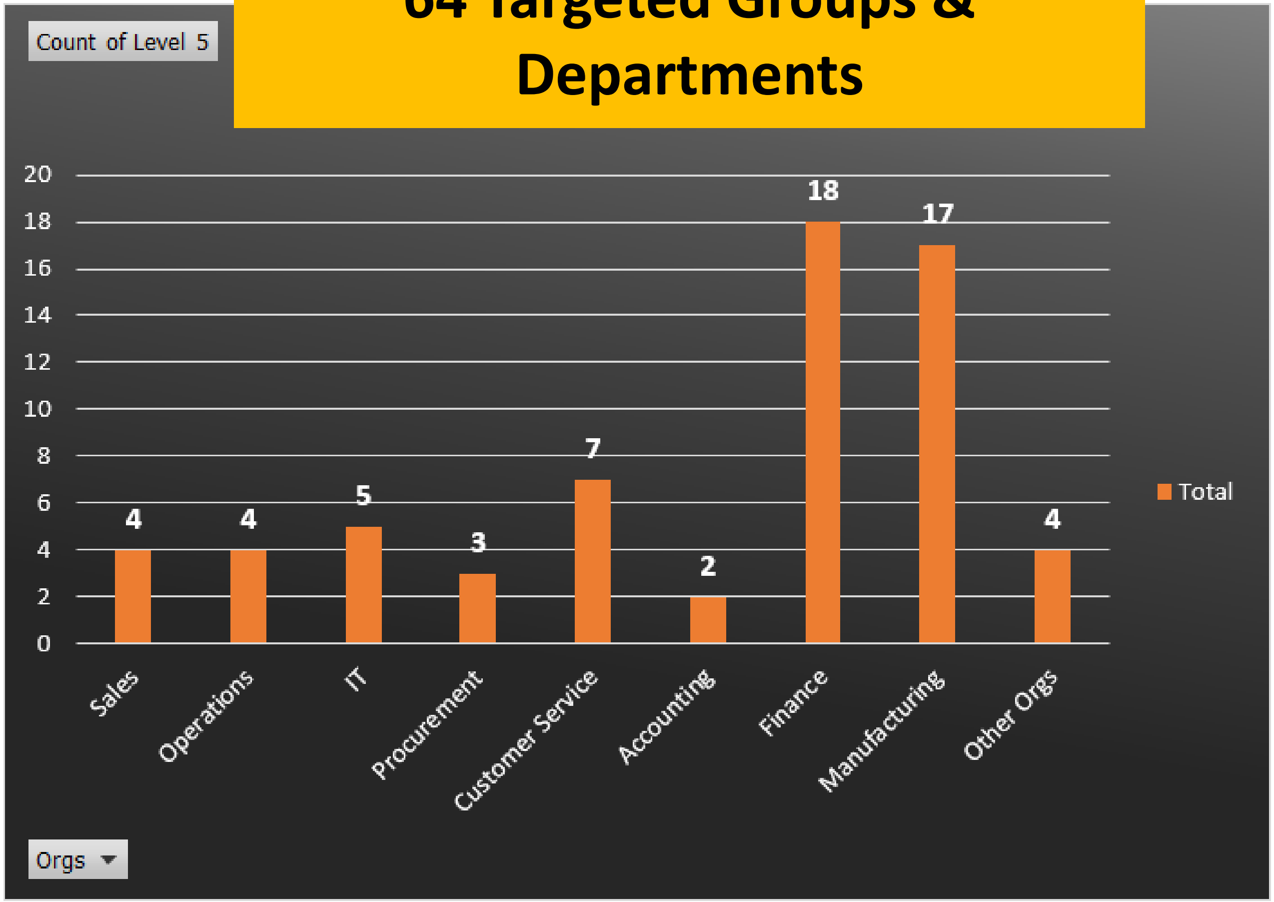
Grand Total	**64**

64 Targeted Groups & Departments



of Target Individuals (Employees, Managers and Customers) Being Impacted

Leverage the below illustration. Enter information for your impacted audience, including the departments/divisions being impacted and total number of impacted users per each.
In the gold box, input your total number of impacted employees & managers and customers.
If you like, you can also ungroup the colored dots from the map and adjust per your organization.
Delete this note.

Sales
124 impacted users

Operations
465 impacted users

IT
124 impacted users

Procurement
461 impacted users

Finance
715 impacted users

Manufacturing
500 impacted users

Customer Service
124 impacted users

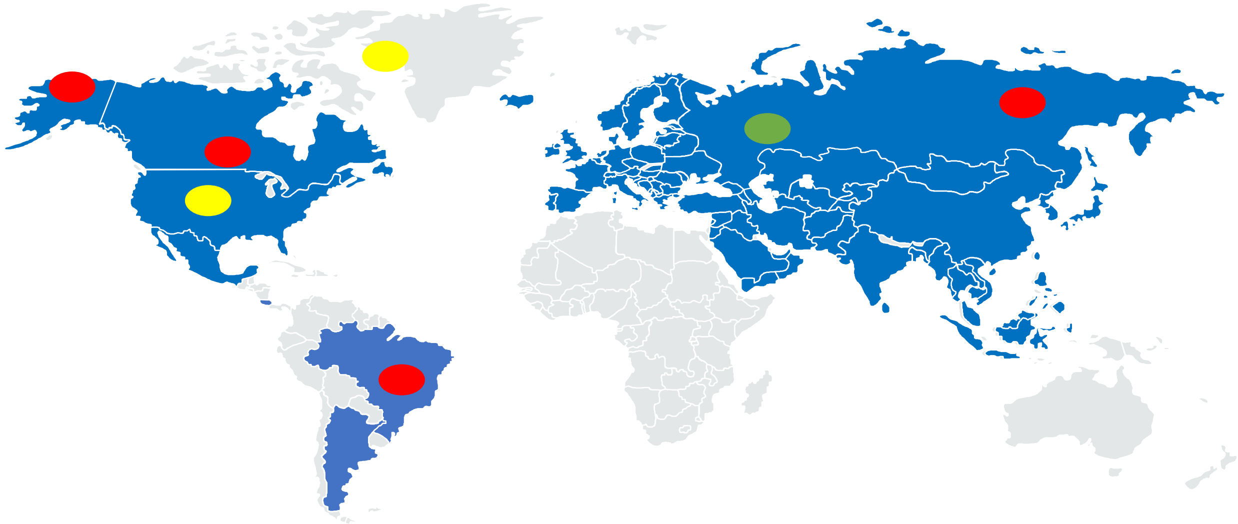
Front Office Supports
400 impacted users

Back Office Support
14 impacted users

Legal
11 impacted users

Customers
1988 impacted users

2,001 Employees & Managers
1,988 Customers



Impact Levels

None | Low | Med | High

Low - Change is minimal

- *No process, system, or behavioral changes required*
- *Awareness of high level changes needed*
- *Primary impacts are to workload*
- ***Training:** Typically handled through communications or short video explanations*

Medium - Change is moderate

- *Moderate process, technology or behavioral changes required*
- *Understanding of changes required*
- *Task changes will be at moderate difficulty level*
- ***Training:** Typically handled by videos and self-based training*

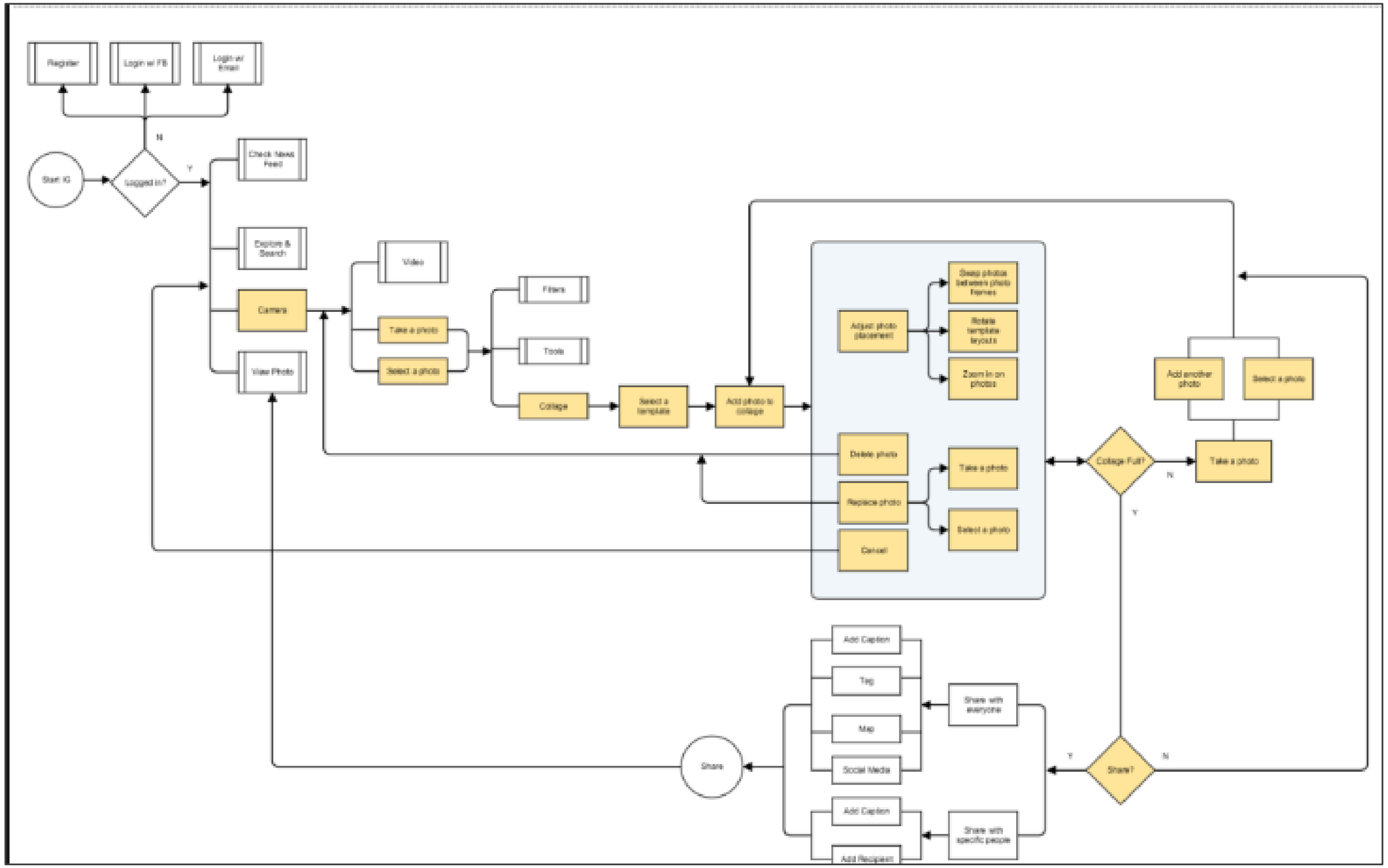
High - Change is substantial

- *Substantial process, technology or behavioral changes required*
- *Required to be SMEs on changes and new concepts*
- *Fundamental job/skills shift*
- ***Training:** Typically handled by videos, self-based training, and reinforcement sessions*

Impacted Business Processes

Insert slides of any impacted business process flows. During meetings, stakeholders will often ask questions about these. It is good for you to have such flows readily available. Delete this note.

SAMPLE (Replace with yours)



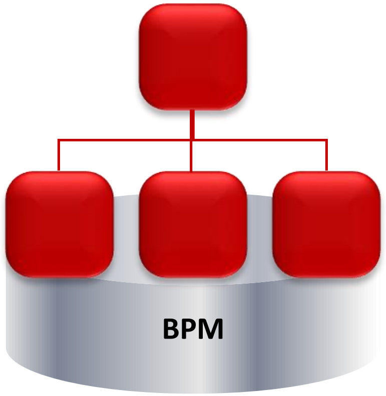
Impacted Systems and Tools

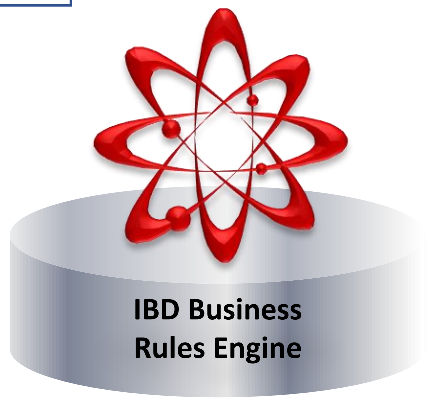
Insert images or a table of the systems and tools that will be impacted. During meetings, stakeholders will often ask questions about these. It is good for you to have them readily available. Delete this note.

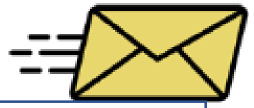
SAMPLE (Replace with yours)

IMAGES *OR* *TABLE*

Datamart







Vendor Comms Software

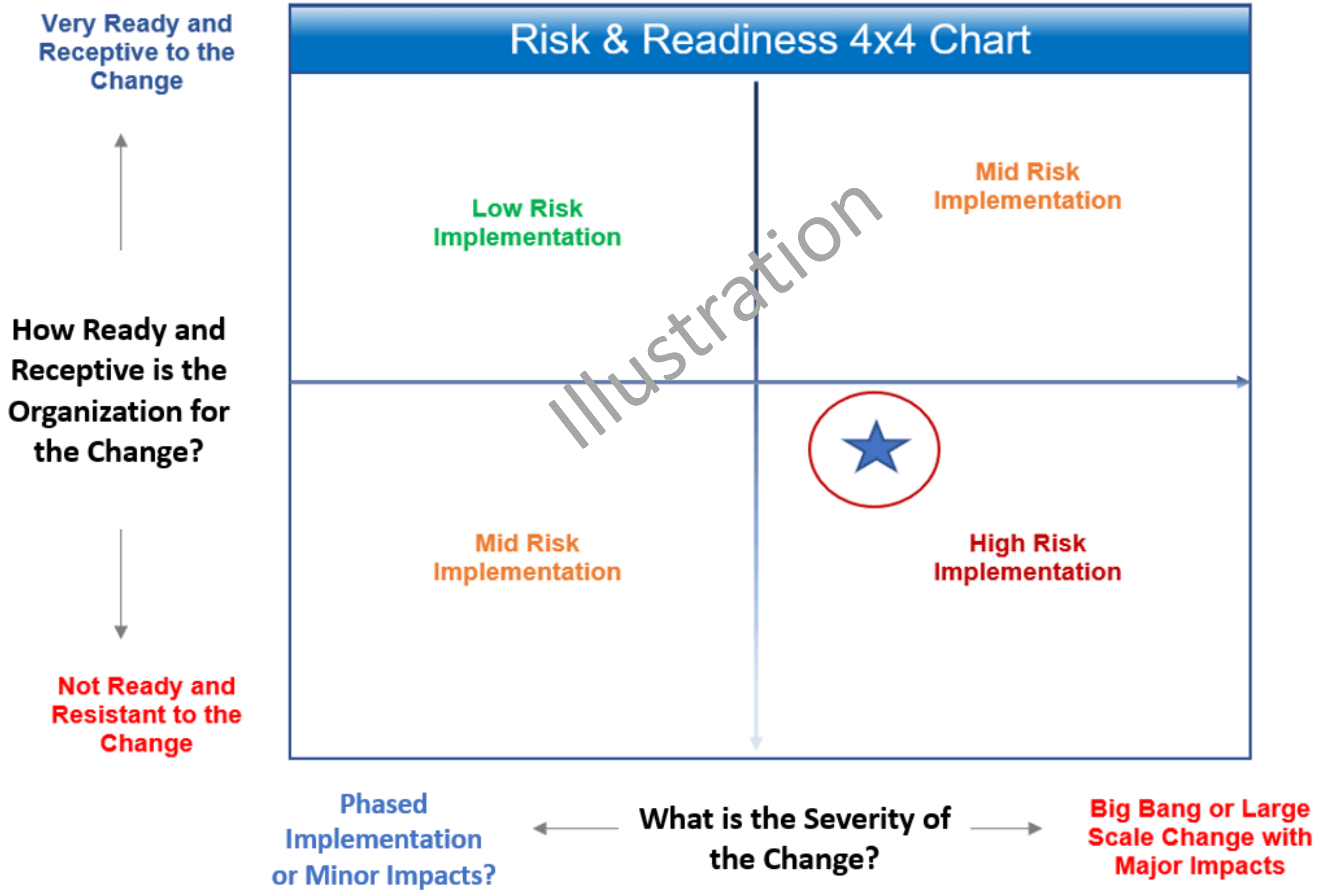
Name of Impacted Tool	Owner	Additional Information

Program + Readiness Risk Assessment

Delete the text below after reading. Insert an image of your 4x4 Program Risk Chart. Delete this note.

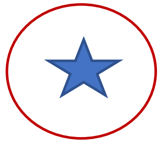
Insert a chart below showing the program and readiness assessment. The program and readiness risk matrix will be an output of the organizational readiness assessments, change impact assessments, audience analysis, and resistance management assessment that you need to perform. If impacted organizations are ready and receptive to the change, then the implementation will have less risk than if impacted organizations are faced with major impacts and are resistant to the change.

SAMPLE (Replace with yours)



Where your program is on this chart will determine the type and scale of change management that will be needed. A high-risk implementation will require a more extensive and broader scaled change management.

For example, your communication should be more frequent, and you should use multiple communication channels. You will also want to implement a more extensive engagement outreach using a multi-program approach involving roadshows, town halls, 1-on-1 meetings, group meetings, video, podcast, open forums, and workshops.



Use this icon or something similar to signify where your program is on the 4x4 chart.

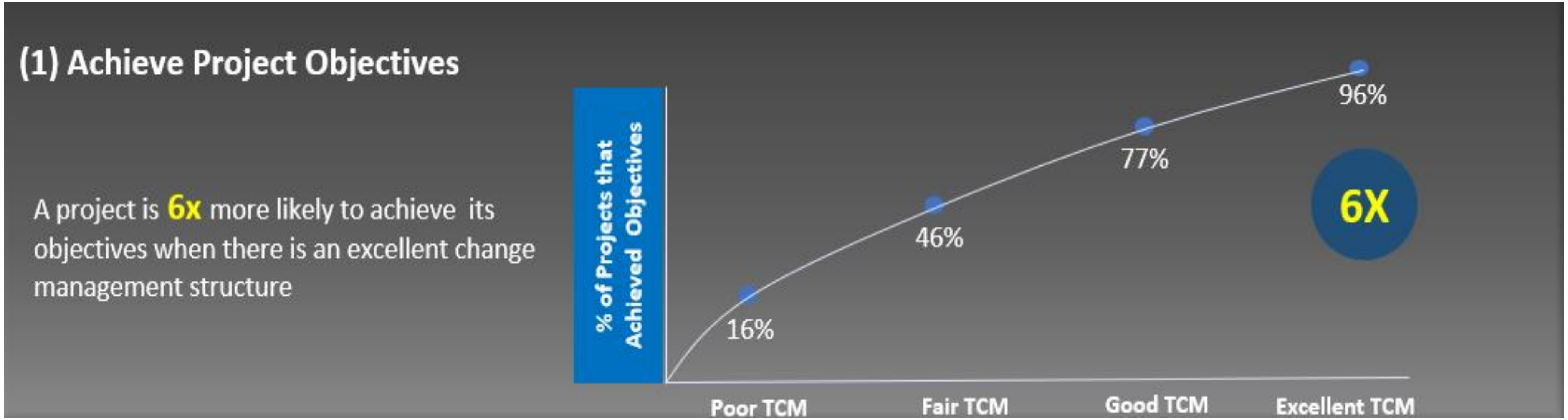
CHANGE MANAGEMENT OVERVIEW & DELIVERABLES

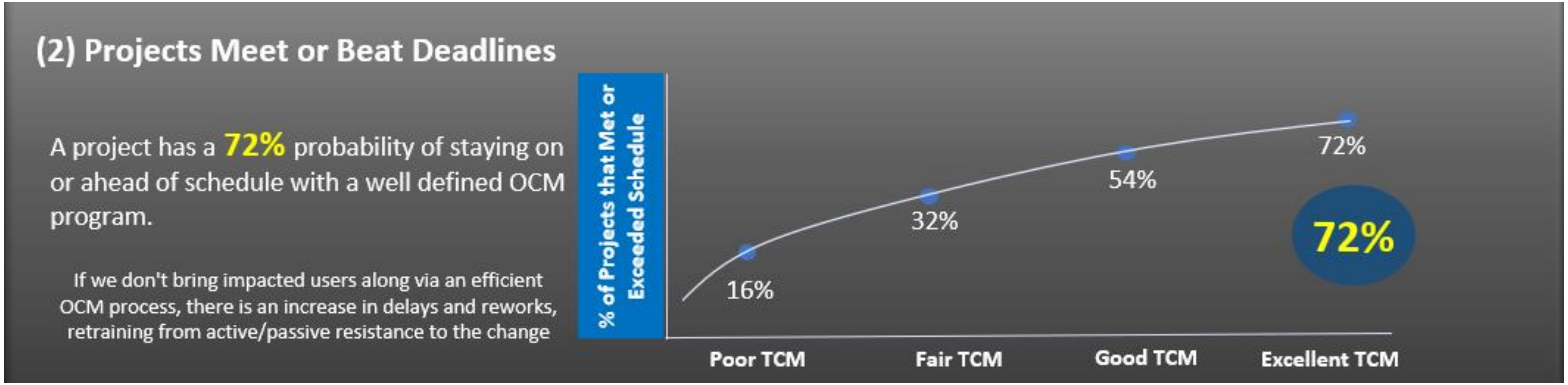
Use the following slides to educate senior leaders and stakeholders on the benefits of change management. Delete this note.

Change Management Benefits

Use this slide to educate senior leaders and stakeholders on the benefits of change management. Delete this note.

The following are beneficial factors why firms are choosing to leverage a structured change management process. These findings are based on decades of studies.



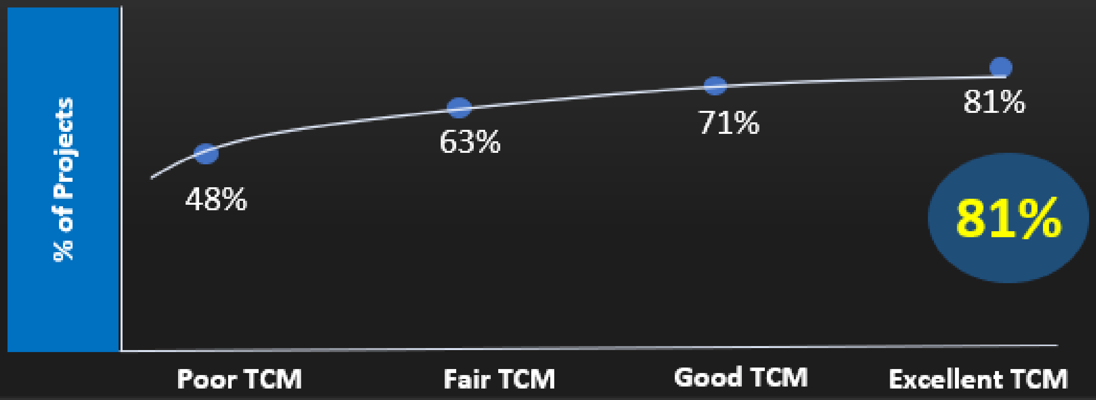


Change Management Benefits (Cont.)

Use this slide to educate senior leaders and stakeholders on the benefits of change management. Delete this note.

(3) Projects Stay on or Beat Budget

With excellent change management processes, a project has an **81%** probability of staying on or ahead of budget.



(4) Increase in Return on Investment (ROI)

Based on a recent McKinsey study, firms with an excellent change management process achieved **143%** of expected ROI versus an average of **35%** of expected ROI

143%

vs.

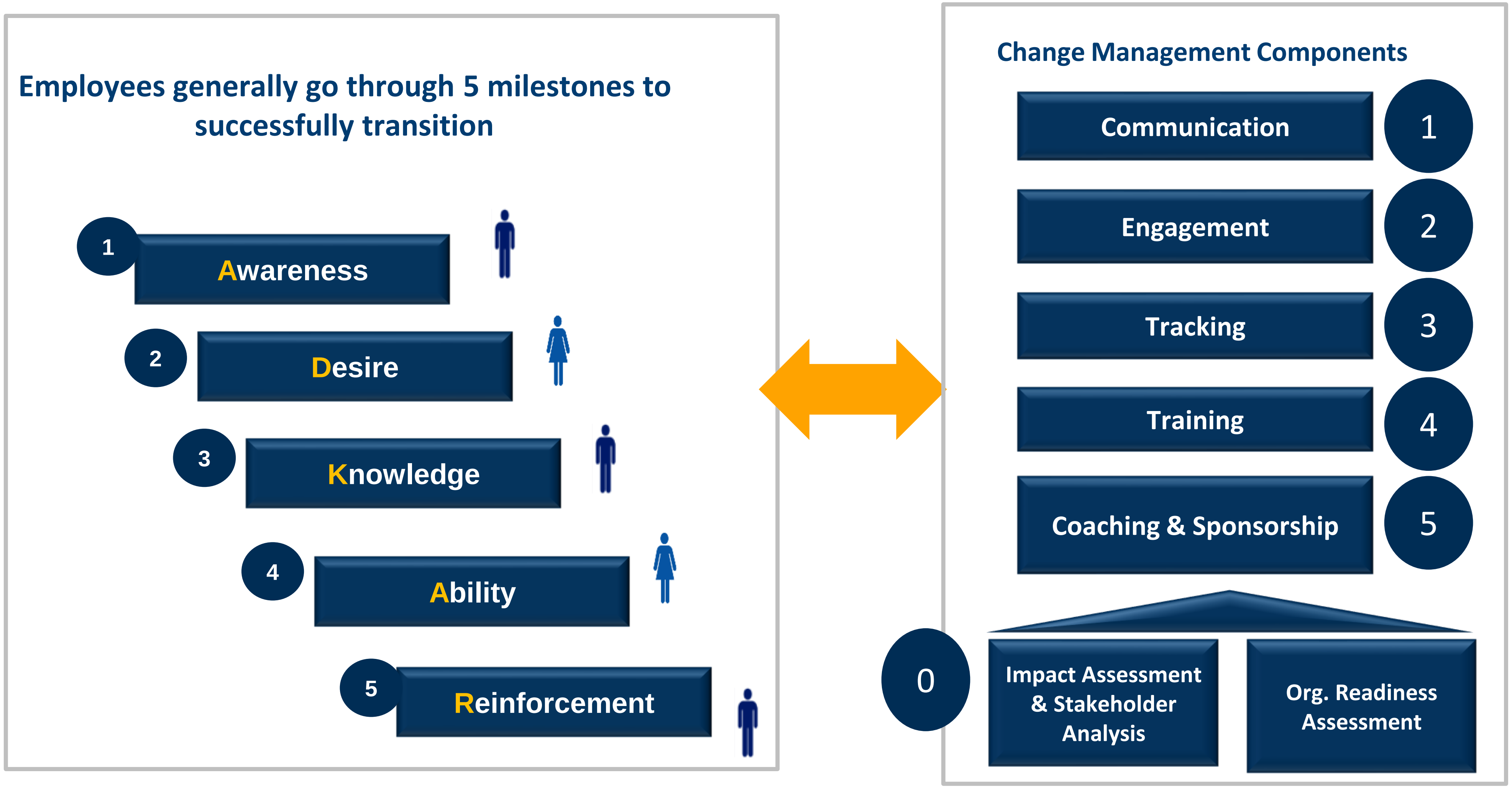
35%

Expected ROI achieved

Change Management Framework

Use this slide to educate senior leaders and stakeholders on the framework that will be used to drive change management. Delete this note.

The change team will apply a structured process based on the Prosci ADKAR framework to influence the 5 milestones of change to help facilitate change adoption.



OCM Objectives

Use this slide to educate senior leaders and stakeholders on the framework that will be used to drive change management. Reword the text at top as needed. Delete this note.

As we develop and execute our change management plans, tools, and practices to manage the people side of the transformation change, we will focus on five key objectives.

Objectives

#	Focus	Objective
1	**Awareness Communication**	Spread clear and effective awareness of the transformation program via a robust communication campaign. Communicate frequently and transparently.
2	**Stakeholder Engagement**	Facilitate stakeholder engagements to educate business units on the level and magnitude of the change and build their desire to support the change.
3	**Build Knowledge**	Lead the development and execution of training programs to provide employees with the knowledge on how to change.
4	**Increase Proficiency**	Facilitate coaching and business user testing of target state processes and procedures to enable new skills and behavior proficiencies.
5	**Sustain the Change**	Reinforce the change to ensure long-term sustenance. Track and measure process adoption, impacted user proficiencies, and change readiness.

3-Phase Process

Use this slide to educate senior leaders and stakeholders on the framework that will be used to drive change management. Delete this note.

There are a wide range of strategies and approaches to delivering organizational change within an organization. A best-in-class change implementation process is to use a three-phase change process.

3-Phase Change Process

Prepare for the Change

Execute & Manage the Change

Reinforce the Change

Change Management Milestones & Phases

Use this slide to educate senior leaders and stakeholders on the milestones and standard change management phases that will be used. Delete this note.

Prepare for the Change | **Execute & Manage the Change** | **Reinforce the Change**

You are here!

Phase 1

1. Stakeholder Analysis
2. Change Impact Assessment
3. Audience Analysis
4. Readiness & Risk Assessment
5. Change Strategy

Start Providing High Level Awareness

Phase 2

Develop & Execute OCM Plans:

1. Communications Plan
2. Engagement Plan
3. Resistance Mgt Plans
4. Coaching Plans
5. UAT & Training Program
6. Change Reinforcement Plan

Phase 3

Go-Live
Change Reinforcement
Success Celebration

End

Program Post Mortem
Change Mgt Disengagement

OCM DELIVERABLES

The following slides will be used to present the change management deliverables that you and your team are planning to deliver.
Delete the slides that are not pertinent to your plan.
Delete this note.

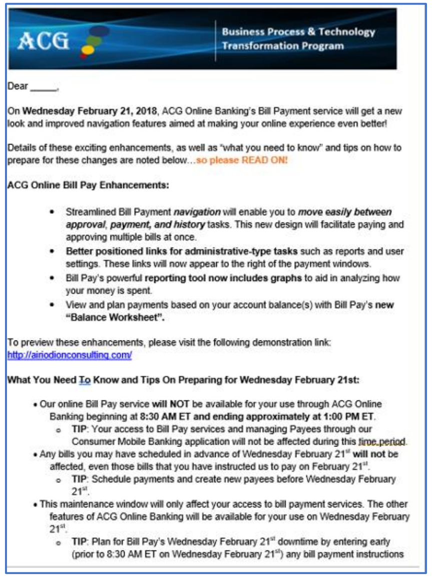
COMMUNICATIONS

Types of Communications Channels

Edit this slide to list your communication channels. Delete slide if it's not needed. Delete this note.

To effectively communicate with stakeholders and all impacted (and potentially impacted) employees and managers, we plan to utilize multiple communication channels.

Awareness Communications


ACG Business Process & Technology Transformation Program

Dear ____,

On **Wednesday February 21, 2018**, ACG Online Banking's Bill Payment service will get a new look and improved navigation features aimed at making your online experience even better!

Details of these exciting enhancements, as well as "what you need to know" and tips on how to prepare for these changes are noted below…so please READ ON!

ACG Online Bill Pay Enhancements:

- Streamlined Bill Payment *navigation* will enable you to *move easily between approval, payment, and history* tasks. This new design will facilitate paying and approving multiple bills at once.
- **Better positioned links for administrative-type tasks** such as reports and user settings. These links will now appear to the right of the payment windows.
- Bill Pay's powerful **reporting tool now includes graphs** to aid in analyzing how your money is spent.
- View and plan payments based on your account balance(s) with Bill Pay's **new "Balance Worksheet"**.

To preview these enhancements, please visit the following demonstration link: http://airiodionconsulting.com/

What You Need To Know and Tips On Preparing for Wednesday February 21st:

- Our online Bill Pay service **will NOT** be available for your use through ACG Online Banking beginning at **8:30 AM ET and ending approximately at 1:00 PM ET**.
  - TIP: Your access to Bill Pay services and managing Payees through our Consumer Mobile Banking application will not be affected during this time period.
- Any bills you may have scheduled in advance of Wednesday February 21st **will not be** affected, even those bills that you have instructed us to pay on February 21st.
  - TIP: Schedule payments and create new payees before Wednesday February 21st.
- This maintenance window will only affect your access to bill payment services. The other features of ACG Online Banking will be available for your use on Wednesday February 21st.
  - TIP: Plan for Bill Pay's Wednesday February 21st downtime by entering early (prior to 8:30 AM ET on Wednesday February 21st) any bill payment instructions

Educational Newsletters


ACG Business Process & Technology Transformation Program

Sent to: Sales, Operations, Finance, Accounting, Procurement, Legal, Compliance, IT, Supply Chain, and other Program Stakeholders Subscribe | Unsubscribe

Why am I receiving this newsletter?

This is an FYI awareness communication to inform you that ACG is transforming its business processes and technology structure to an industry standard model*. The intent of this communication is to inform managers and employees about the transformation, as well as provide resources to learn more.

At this moment there is no action required from you. Please see the "What's Next" section below.

Awareness Communication

Background on the Transformation

ACG leadership recognizes our legacy business processes and technology infrastructure capabilities are limiting our production, supply chain, and sale of new products

To remain competitive, improve efficiencies, and enable new products & business models, ACG's fragmented and siloed product data processes and systems must evolve.

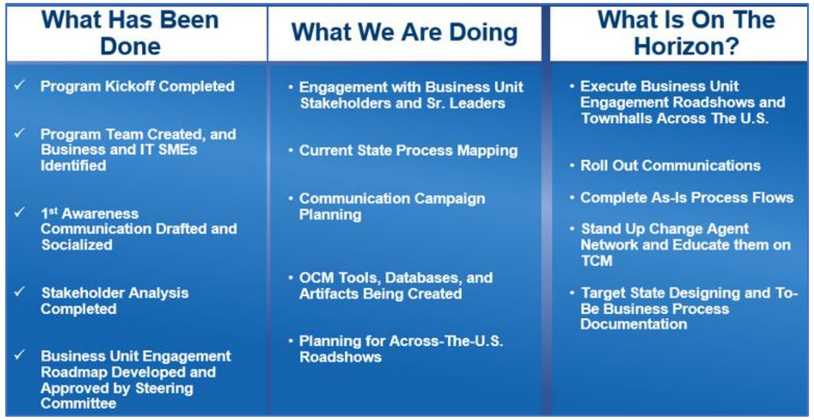
What's Next?

(1) Watch out for future program communications on the progress of the program

(2) Starting in Q1 2019, we will commence meetings with organizations to present a detailed overview of the program, and to answer your questions

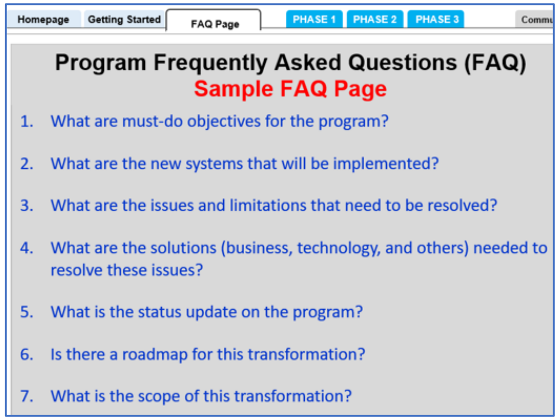
(3) Throughout the next 2-4 quarters we will conduct our impact assessments to determine how and when your group's processes and solutions will be affected

Monthly 3x5 Updates



What Has Been Done	What We Are Doing	What Is On The Horizon?
✓ Program Kickoff Completed ✓ Program Team Created, and Business and IT SMEs Identified ✓ 1st Awareness Communication Drafted and Socialized ✓ Stakeholder Analysis Completed ✓ Business Unit Engagement Roadmap Developed and Approved by Steering Committee	• Engagement with Business Unit Stakeholders and Sr. Leaders • Current State Process Mapping • Communication Campaign Planning • OCM Tools, Databases, and Artifacts Being Created • Planning for Across-The-U.S. Roadshows	• Execute Business Unit Engagement Roadshows and Townhalls Across The U.S. • Roll Out Communications • Complete As-Is Process Flows • Stand Up Change Agent Network and Educate them on TCM • Target State Designing and To-Be Business Process Documentation

FAQ Page

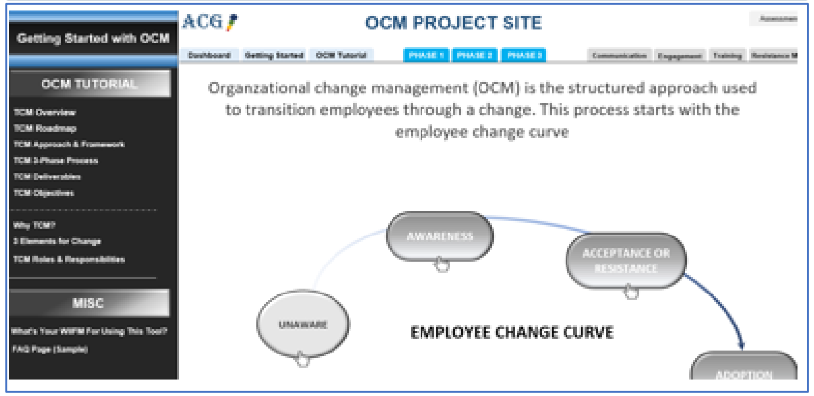


Program Frequently Asked Questions (FAQ)

Sample FAQ Page

1. What are must-do objectives for the program?
2. What are the new systems that will be implemented?
3. What are the issues and limitations that need to be resolved?
4. What are the solutions (business, technology, and others) needed to resolve these issues?
5. What is the status update on the program?
6. Is there a roadmap for this transformation?
7. What is the scope of this transformation?

Company Blog



Many More

Videos & Podcasts

Awareness Email Communication

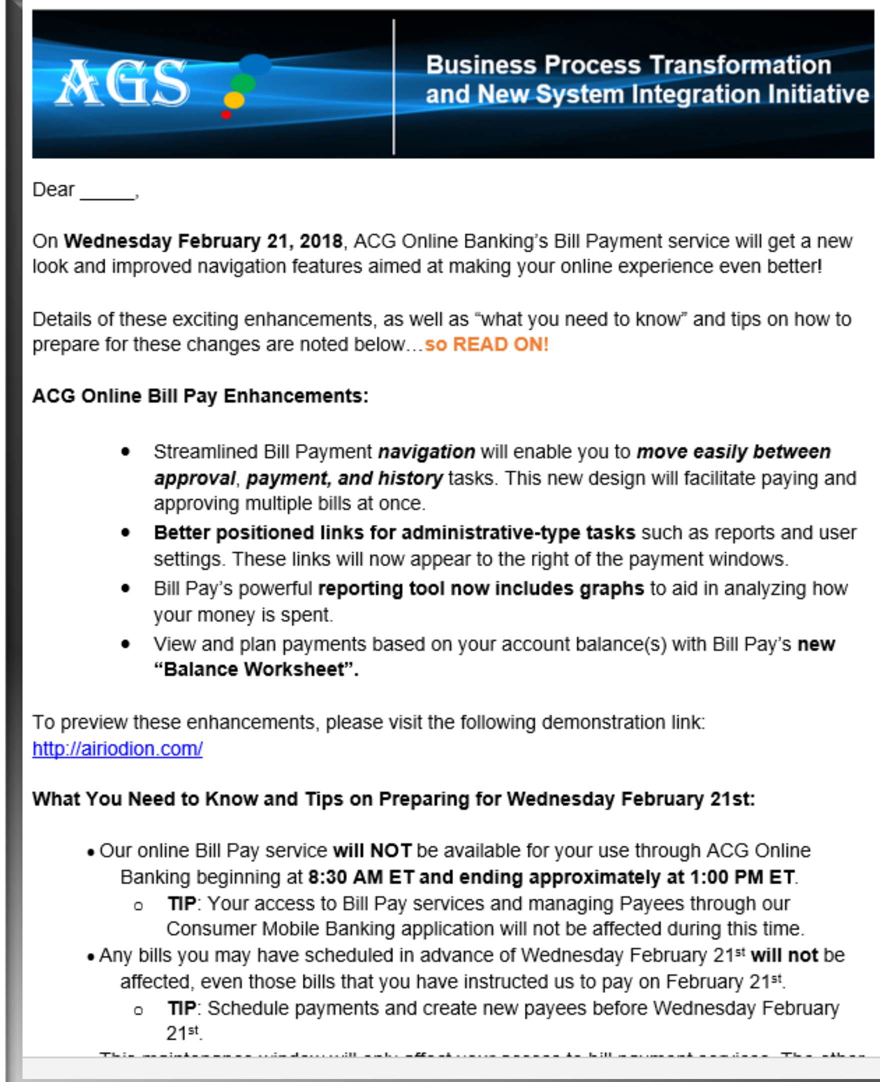
Edit this slide to add your Awareness Email snapshot and a preview link. Delete slide if it's not needed. Delete this note.

Regular awareness and program status update emails are essential for engaging with stakeholders and your target audience, especially those that are impacted by the change.

These types of email communications are effective for providing impacted employees and customers with a good understanding of the program (what is changing, what are the benefits of changing, what's the risk of not changing, etc.) as well as keeping end users engaged throughout the duration of the change.

Awareness emails are extremely efficient in providing educational and tutorial knowledge, including details of the enhancements, as well as what end users need to know, and tips on how end users can prepare for the change.

SAMPLE



AGS | **Business Process Transformation and New System Integration Initiative**

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Newsletters

Edit this slide to add your Newsletter snapshot and update the text as needed. Delete slide if it's not needed. Delete this note.

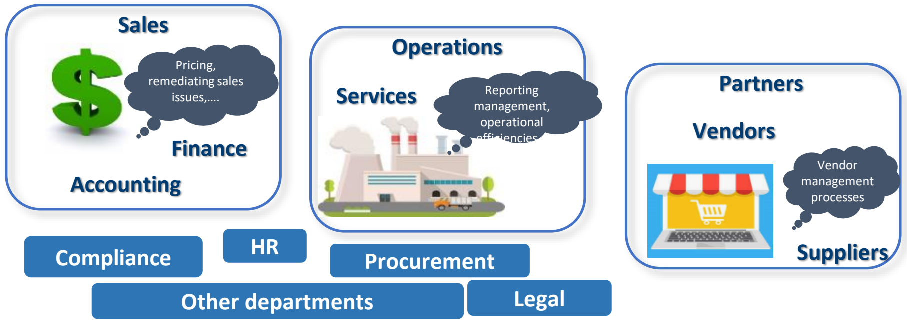
Newsletters are effective for providing awareness of a program. People generally skim through communications, and so using a newsletter structure using succinct messages and other medias (images, embedded videos, video links, etc.) with a call to action will help increase the engagement with the reader.

Based on the project phase and what needs to be communicated, we will draft, socialize, and broadcast structured newsletters using a set cadence (i.e., weekly, bi-monthly, monthly, every 2 months, etc.).

Such newsletters will involve:

- Program Kick-Off communication
- Internal program team communications (IT, Biz, Ops)
- Educational information
- Updates (program successes, goals, what's next, roadshows, resets, etc.)

Where possible, we will customize newsletters based on the targeted audience.



Sample Newsletter

AGS

Business Process Transformation and New System Integration Initiative

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ACG leadership recognizes our legacy business processes and technology infrastructure capabilities are limiting our production, supply chain, and sale of new products

To remain competitive, improve efficiencies, and enable new products & business models, ACG's fragmented and siloed product data processes and systems must evolve.

Today	Tomorrow
Extensive Manual Human Efforts Limiting Revenue Growth	ENABLE FUTURE PRODUCTS & REVENUE GROWTH
Fragmented + Silo'd Business Processes Impacting Operations and Compliance	IMPROVED OPERATIONS Simplified and Integrated Business Processes + End-to-End Systems

What's Next?

Program Awareness Presentation Campaign

Engagement with Impacted Groups

(1) Watch out for future program communications on the progress of the program

(2) Starting in Q1 2019, we will commence meetings with organizations to present a detailed overview of the program, and to answer your questions

(3) Throughout the next 2-4 quarters we will conduct our impact assessments to determine how and when your group's processes and solutions will be affected

For Questions / More Information

3x5 Leadership Update

Edit this slide if needed for your 3X5 communication strategy.
Delete slide if it's not needed. Delete this note.

Our communication strategy will include 3x5 regular updates to stakeholders, impacted managers and key contacts. As the name implies, a 3x5 update is a succinct update that presents three columns (what we achieved, what we are doing, what we plan to do) and each column will list five achieved, in-progress and planned activities, respectively.

Monthly 3x5 Leadership Updates

Follow www.SharePoint.com/......

What Has Been Done	What We Are Doing	What Is On The Horizon?
✓ Program Kickoff Completed	• Engagement with Business Unit Stakeholders and Sr. Leaders	• Execute Business Unit Engagement Roadshows and Townhalls Across The U.S.
✓ Program Team Created, and Business and IT SMEs Identified	• Current State Process Mapping	• Roll Out Communications
✓ 1st Awareness Communication Drafted and Socialized	• Communication Campaign Planning	• Complete As-Is Process Flows
✓ Stakeholder Analysis Completed	• OCM Tools, Databases, and Artifacts Being Created	• Stand Up Change Agent Network and Educate them on TCM
✓ Business Unit Engagement Roadmap Developed and Approved by Steering Committee	• Planning for Across-The-U.S. Roadshows	• Target State Designing and To-Be Business Process Documentation

FAQ & Company Blog

Edit this slide’s text and images as needed per your program.
Delete slide if it’s not needed. Delete this note.

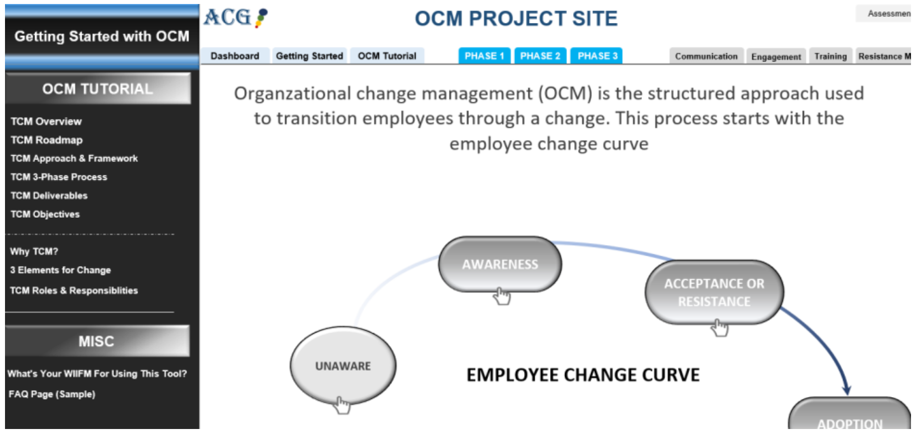
FAQ Page

To address frequently asked questions about the change, we will leverage an FAQ page. This page will be maintained regularly. On all communications, we will add a link to this FAQ page.

The FAQ page will be published and maintained on the firm’s blog. This provides the broadest level of access to all employees. Confidential level information will not be posted on this page.

Intranet/Blog

To more effectively coordinate and achieve a broad level of engagement, we will leverage the company’s site (or create a program focused site) for communication and engagement.



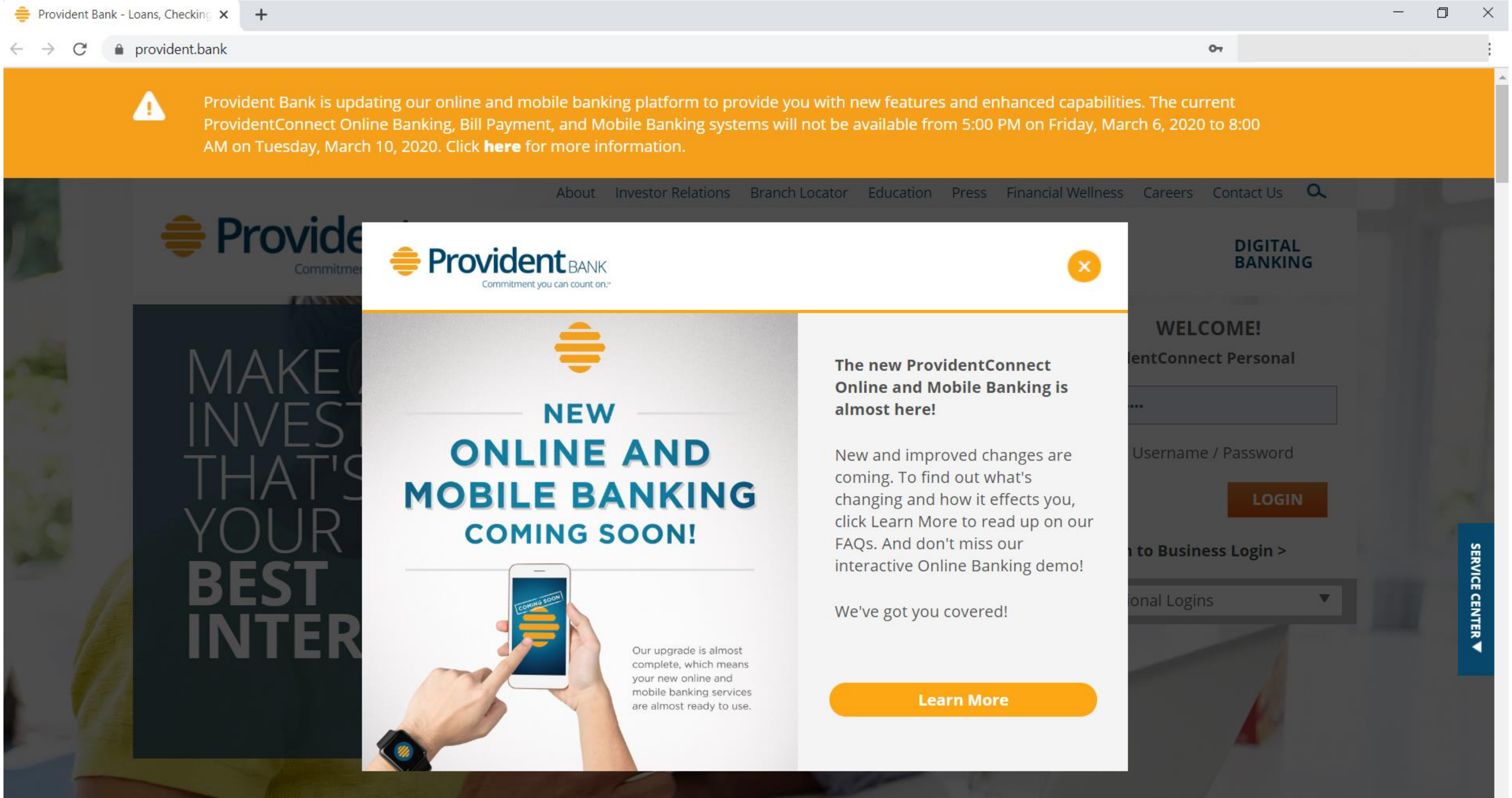
Videos & Recordings

Where possible, we will record engagement sessions, training, coaching, workshops and other touchpoints. These will be posted on the firm’s website, on our FAQ page or on the project page for stakeholders to view when convenient.

Banners - Example

Edit this slide text and images as needed per your program.
Delete slide if it’s not needed. Delete this note.

Our communication strategy will include the use of Banners or Popups the company website homepage. Below is an example of Provident Bank using a popup to remind customers of new changes



Communications Plan

Edit this slide image to reflect your Communications Plan.
Delete slide if it's not needed. Delete this note.

A detailed communications plan will be developed that will include our targeted audience, communication message, frequency of communication, and delivery method.

Communications Management Matrix Database

#	What We Need to Communicate and Why	Communication Groups (Audience)	Date	Frequency	Series	Series Group #	Delivery Channel	Sender Name	Sender Title	Sender Dept	Communication Message	Subject Line (Emails)	Unique Communication Requirement / Requests
1	Provide users with basic info	Sales	12/1/18	4 Weeks Befo	First Notification	1	Email	Jane Doe	Director	HR	To all Company employees	Supply Chain Stakeholder Training Starting in 2 Weeks	
2	Provide users with basic info	Demand Planning	12/1/18	4 Weeks Befo	First Notification	1	Email	Jane Doe	Director	HR	To all Company employees	Supply Chain Stakeholder Training Starting in 2 Weeks	
3	Provide users with basic info	Logistics	12/1/18	4 Weeks Befo	First Notification	1	Email	Jane Doe	Director	HR	To all Company employees	Supply Chain Stakeholder Training Starting in 2 Weeks	
4	Provide users with basic info	Transportation	12/1/18	4 Weeks Befo	First Notification	1	Email	Jane Doe	Director	HR	To all Company employees	Supply Chain Stakeholder Training Starting in 2 Weeks	
5	Provide users with basic info	Order Management	12/1/18	4 Weeks Befo	First Notification	1	Email	Jane Doe	Director	HR	To all Company employees	Supply Chain Stakeholder Training Starting in 2 Weeks	
6	Announce to site adminstrat	IT	10/15/18	Once	First Notification	2	Email	John Doe	Senior Director	IT	Announcement to Site Adı	Supply Chain Transformation Update: Announcement to Site A	
7	Announce to site adminstrat	HR	10/15/18	Once	First Notification	2	Email	John Doe	Senior Director	IT	Announcement to Site Adı	Supply Chain Transformation Update: Announcement to Site A	
8	Announce to site adminstrat	Marketing	10/19/18	Once	First Notification	2	Email	John Doe	Senior Director	IT	Announcement to Site Adı	Supply Chain Transformation Update: Announcement to Site A	
9	Announce to site adminstrat	Logistics	10/21/18	Once	First Notification	2	Email	John Doe	Senior Director	IT	Announcement to Site Adı	Supply Chain Transformation Update: Announcement to Site A	
9	Announce to site adminstrat	ABCXYZ Dept	10/21/18	Once	First Notification	2	Email	John Doe	Senior Director	IT	Announcement to Site Adı	Supply Chain Transformation Update: Announcement to Site A	
10	To spread awareness about t	IT	12/1/18	Once	Second Notificatior	2	Group Meetings	Sarah Joe	Senior Director	Transportation	Hello Company Employee	No Subject Line (Group Meetings)	
11	To spread awareness about t	Transportation	12/1/18	Once	Second Notificatior	2	Group Meetings	Lisa List	Manager	Transportation	Hello Company Employee	No Subject Line (Group Meetings)	
12	To spread awareness about t	Logistics	12/1/18	Once	Second Notificatior	2	Group Meetings	Mike Charles	Manager	Logistics	Hello Company Employee	No Subject Line (Group Meetings)	
13	To spread awareness about t	Sales	12/5/18	Once	Second Notificatior	2	Group Meetings	Mike Charles	Manager	Sales	Hello Company Employee	No Subject Line (Group Meetings)	
14	To spread awareness about t	Return	12/6/18	Once	Second Notificatior	2	Group Meetings	Mike Charles	Manager	Return	Hello Company Employee	No Subject Line (Group Meetings)	
15	To spread awareness about t	Sourcing	12/9/18	Once	Second Notificatior	2	Group Meetings	Lisa List	Director	Sourcing	Hello Company Employee	No Subject Line (Group Meetings)	
16	To spread awareness about t	Procurement	12/9/18	Once	Second Notificatior	2	Group Meetings	Heather Dunba	Senior Director	Legal	Hello Company Employee	No Subject Line (Group Meetings)	
16	To spread awareness about t	ABCXYZ Dept	12/9/18	Once	Second Notificatior	2	Group Meetings	Heather Dunba	Senior Director	Legal	Hello Company Employee	No Subject Line (Group Meetings)	
17	To spread awareness and ge	Accounting	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
18	To spread awareness and ge	Audit	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
19	To spread awareness and ge	Communications	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
20	To spread awareness and ge	Demand Planning	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
21	To spread awareness and ge	Finance	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
22	To spread awareness and ge	HR	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
23	To spread awareness and ge	IT	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
24	To spread awareness and ge	Legal	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
25	To spread awareness and ge	Logistics	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
26	To spread awareness and ge	Marketing	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
27	To spread awareness and ge	Order Management	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
28	To spread awareness and ge	Procurement	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
29	To spread awareness and ge	Return	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
30	To spread awareness and ge	Sales	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
31	To spread awareness and ge	Sourcing	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
32	To spread awareness and ge	Training	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
33	To spread awareness and ge	Transportation	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
33	To spread awareness and ge	ABCXYZ Dept	2/6/19	Once every 2 \	First Notification	3	Email	Pen Marks	Communications Di	Communications	The Business Infrastrature	Announcement to Internal Supply Chain Department Personne	
34	To inform and spread awaren	Demand Planning	4/5/19	Once	Second Notificatior	3	Email	Pen Marks	Communications Di	Communications	To all Company employees	Announcement of New System	

Communications Template & Sample

https://www.airiodion.com/communications-management-tool/

SPONSORSHIP & STAKEHOLDERS ENGAGEMENT

Sponsors & Stakeholders Plan

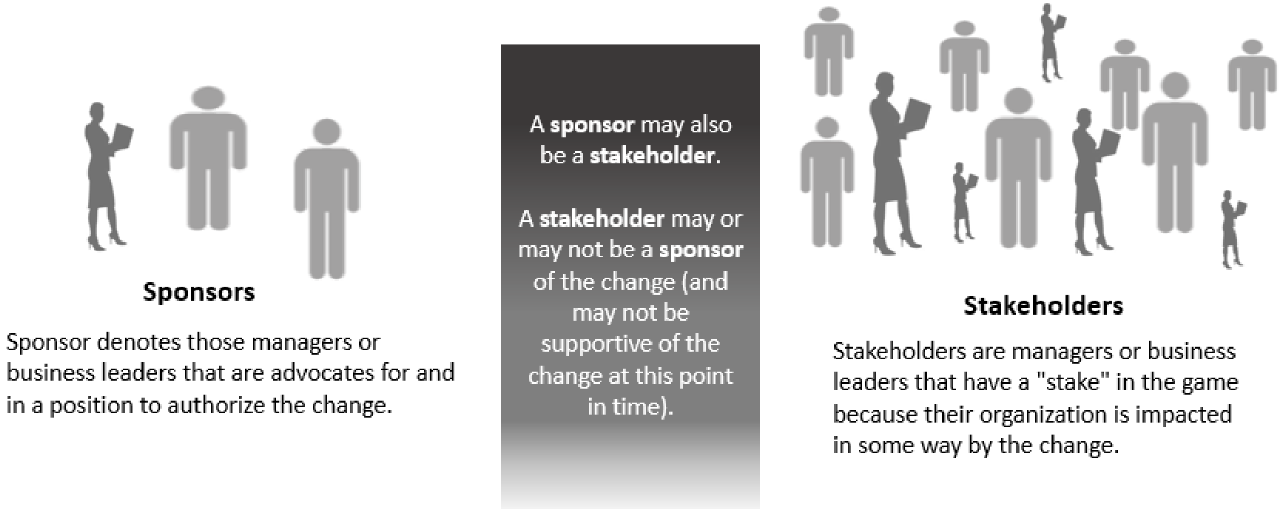
This slide is for educational purposes. You can delete after reading, or leave it, if you feel others need this information. Delete this note.

A stakeholder & sponsors matrix plan needs to be developed for your program to build commitment from targeted groups and individuals.

You should revisit and refine your plan periodically as the project progresses and more information is discovered. Use this plan to ensure consistent, deliberate engagement with sponsors and stakeholders to get their help in advocating the program, mitigating resistant, and supporting communication efforts.

Stakeholders are managers or business leaders that have a "stake" in the game because their organization is impacted in some way by the change.

A sponsor may also be a stakeholder. In order to effectively support a project, sponsors and stakeholders might need coaching and orientation on best change management practices as well as direct assistance from the change management team during the project



In addition to sponsors and stakeholders, there is another group known as **critical** stakeholders. A critical stakeholder is any stakeholder that is required to be on board as a sponsor or an advocate of the program in order for the program to succeed. These are often powerful or highly influential managers within the organization who will be touched by the program. They may or may not be sponsors at this point in time.

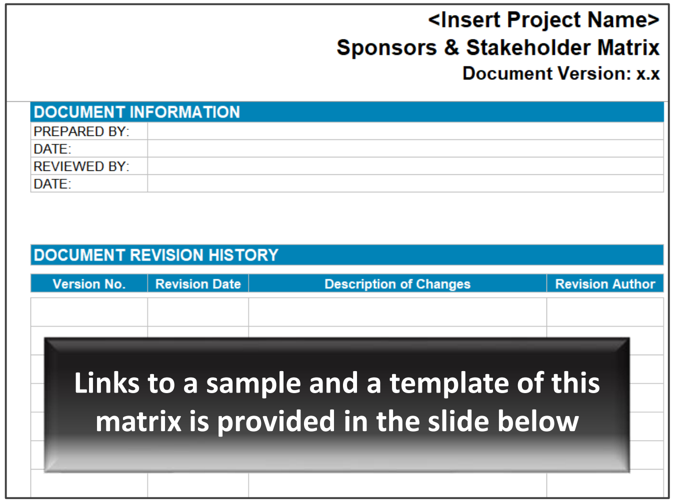
Use this slide to communicate your sponsor/stakeholder plan. Edit where needed. Delete this note.

Assessing & Engaging with Sponsors & Stakeholders

As part of our change activities we will apply a three-step sponsorship and stakeholder engagement process.

Step 1. Identify the Sponsors and Stakeholders for the Project

We will work with the program team and primary sponsors to identify key stakeholders (Executives, Leaders, and Managers) needed to support the program, as well as senior managers and executives of impacted organizations who are considered critical stakeholders.


<Insert Project Name>
Sponsors & Stakeholder Matrix
Document Version: x.x

DOCUMENT INFORMATION	
PREPARED BY:	
DATE:	
REVIEWED BY:	
DATE:	

DOCUMENT REVISION HISTORY

Version No.	Revision Date	Description of Changes	Revision Author

Links to a sample and a template of this matrix is provided in the slide below

Step 2. Assess Each Sponsor & Key Stakeholder's Competencies

We will conduct an assessment of each stakeholder and sponsor's desired commitment levels and influence of the program and document this information in a Sponsor & Stakeholder Database. (NOTE: this assessment is typically not widely shared).

The Sponsors & Stakeholder Matrix will be used to capture information and the high-level approach that will be followed to engage each identified sponsor and stakeholder. For each individual the following can be captured: current level of commitment, desired level of commitment and other important information, including: Role, title, reporting structure, level of influence, criticality to the initiative's success, concerns, pain points, etc.

In addition, we will assess each sponsor and stakeholder's change management competency. This will be performed in order to find out which stakeholders need training, coaching or additional support to be a good sponsor of the change.

Step 3: Prepare Sponsor(s) & Key Stakeholders

For those managers that need coaching, we will provide the necessary level of coaching and education to support them in their role as change agents for the program. Our coaching plan will define how we will support managers and supervisors during the change and how they will interact with front-line employees.

Our role will be to fully enable these managers and supervisors to:

A. Sponsor the change
B. Support their employees during the change
C. Support their employees in the new, changed environment.

Sponsors & Stakeholder Matrix Database

https://www.airiodion.com/stakeholder-tool/

BUSINESS UNITS & END USERS ENGAGEMENT

Engaging End-Users and Business Units

This slide is for educational purposes. You can delete after reading, or leave it if you feel others need this information. Delete this note.

To increase the success of a transformational change, business units and end users impacted by the change need to successfully accept, embrace and adopt the new processes and solutions.

A key function of change management is to engage these groups and help increase change adoption. Communication (via email, newsletters, and other digital channels) is one process for engaging these groups. Another process is via face-to-face or virtual engagement.

Engagement is the interactive component of communicating a change.

Effective engagement involves applying a multi-prong process including:

Roadshows

Workshops

Team Meetings

Townhalls

Video Meetings, Webinars, Skype Sessions, Video Recordings, Online Meetings, and many more..

Engaging End-Users and Business Units (2)

This slide is for educational purposes. You can delete after reading, or leave it if you feel others need this information. Delete this note.

Impact Review Workshops
(Walk-the-Flow)

- Scope and magnitude of the change
- Roles impacted
- Impacted locations
- Type of change (process, system, policy, data, org structure)
- Impacted groups
- Timing of impact

Identify Org Readiness Gaps,
Comms & Training Requirements

- Needed skillset and knowledge
- Performance support needs (i.e. job aides and business procedures, policies, process guidance)
- Group’s TCM suggestions (for Training, Comms, etc.)

Engagement Process

Use this slide to communicate your engagement process. Edit where needed. Delete this note.

When developing and executing our engagement plans, we will apply a structured (and customizable) process to ensure we effectively engage all impacted groups and end-users.

Engagement Process

Identify Impacted Groups, Divisions and Departments

Get Input From:

- *Stakeholder analysis*
- *Impact assessments*
- *Inputs from project team, stakeholders, SMEs, sponsors and others*

Identify Impacted Employees and Managers

Get Input From:

- *Stakeholder analysis*
- *Impact assessments*
- *Audience analysis*
- *Inputs from project team, stakeholders, SMEs, sponsors and others*

Determine What Engagement Channels will be Used

Get Input From:

- *What we aim to achieve from the engagement (Objectives)*
- *Location, geo, # of participants*
- *The nature of the message that needs to be presented (program education, impacts, etc.)*
- *Other inputs*

Determine Which Groups & Employees to Engage with First (Set a Prioritization Sequence)

Get Input From:

- *Level and severity of impacts for each identified group*
- *Level of resistance or receptiveness of each group for the program*
- *The nature of the message that needs to be presented (program education, impacts, etc.)*
- *Inputs from project team, stakeholders, SMEs, sponsors and others*

Establish Points of Contact, Change Champions, Admins, & Other Resources

These individuals will help provide us (the Change and Project Team) with a leg into their respective organizations and help us in scheduling our engagement with their respective impacted groups and staff

Develop Customized Engagement Presentation Materials

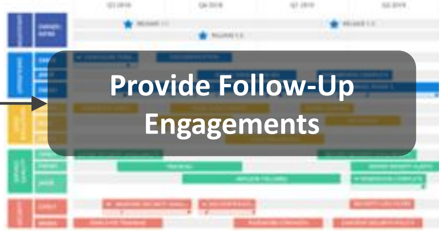
Get Input From:

- *Points of contacts, change champions and other resources*
- *What we aim to achieve from the engagement (Objectives)*
- *What we aim to communicate to each group*

Schedule & Send Out Communications about the Presentations

- *Contact managers within each group. Update them on what we hope to achieve with our engagement and coordinate with them to validate the list of employees that should be invited to the presentation*
- *Work with managers, points of contacts, admins, change champions and others to schedule the presentations (workshops, team meetings, webinar, etc.)*
- *Where possible, co-mingle/invite related groups to the same presentation*

Execute the Engagement



Provide Follow-Up Engagements

RESISTANCE MANAGEMENT

Levels of Resistance to the Project

Leverage the below illustration. Enter information for your impacted departments/divisions and total number of impacted users per each.
Use the dot colors to signify the overall resistance level of each group.
If you like, you can also ungroup the colored dots from the map and adjust per your organization. Delete this note.

Sales
124 impacted users

Operations
465 impacted users

IT
124 impacted users

Procurement
461 impacted users

Finance
715 impacted users

Manufacturing
500 impacted users

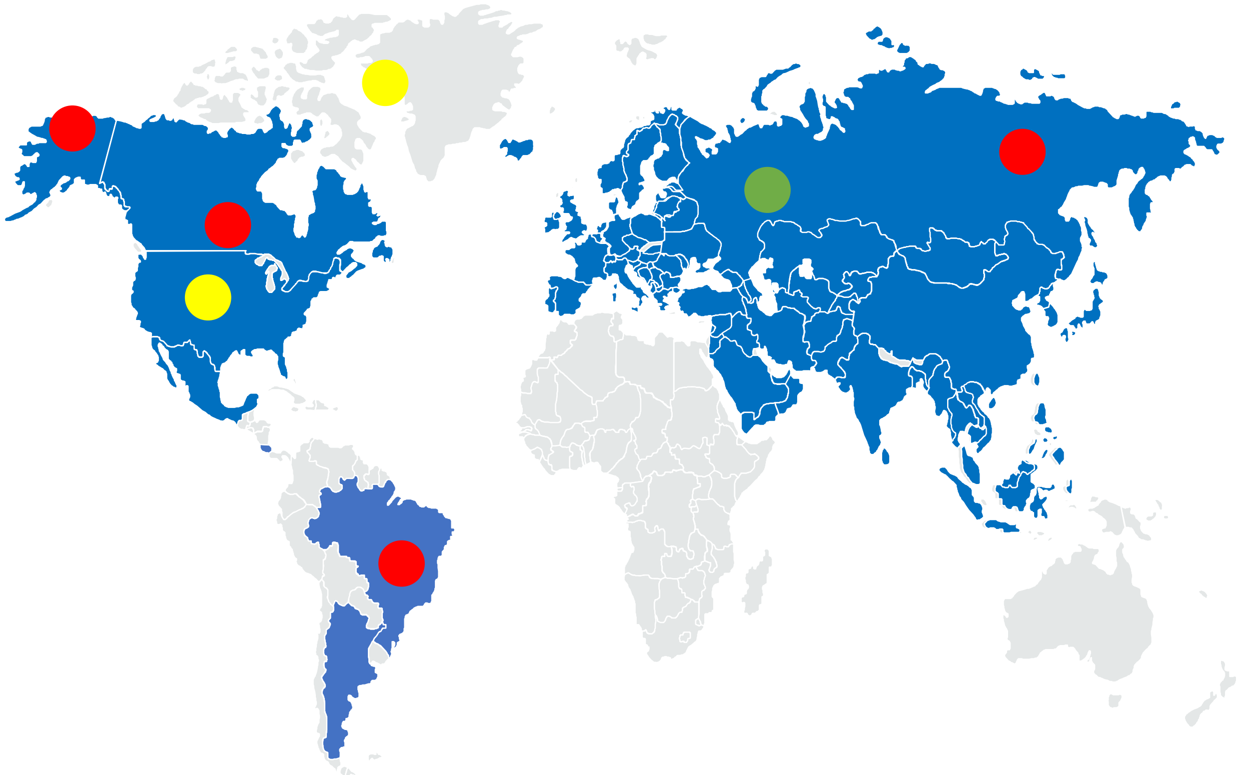
Customer Service
124 impacted users

Front Office Supports
400 impacted users

Back Office Support
14 impacted users

Legal
11 impacted users

Customers
1988 impacted users



Resistance Scale (Legend)

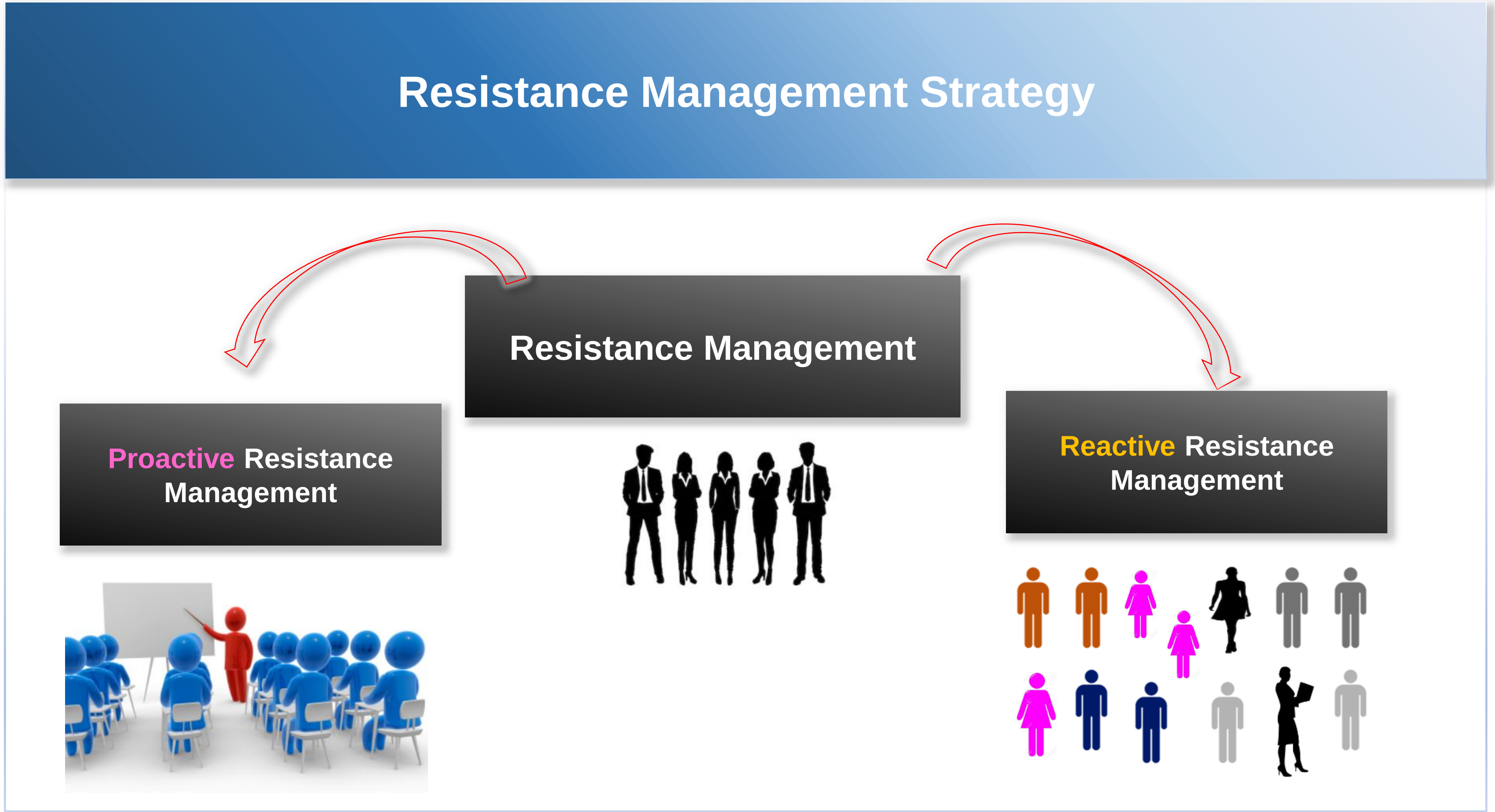
Impact Levels None | Low | Med | High

Low: Resistance is minimal
- *No process, system, or behavioral changes required*
- *Awareness of high level changes needed*
- *Primary impacts are to workload*
- ***Training:** Typically handled through communications or short video explanations*

Medium: Resistance is moderate
- *Moderate process, technology or behavioral changes required*
- *Understanding of changes required*
- *Task changes will be at moderate difficulty level*
- ***Training:** Typically handled by videos and self-based training*

High: Resistance is substantial
- *Substantial process, technology or behavioral changes required*
- *Required to be SMEs on changes and new concepts*
- *Fundamental job/skills shift*
- ***Training:** Typically handled by videos, self-based training, and reinforcement sessions*

Strategy to Reduce Resistance



Educating Stakeholders on Resistance

Use this slide to educate senior leaders and stakeholders on your plans to mitigate resistance. Delete if not needed. Delete this note.

Expect Resistance

Resistance is a Natural Human Behavior

Do not be surprised by resistance! Even if the transformational change presents a wonderful improvement to key problems that have been plaguing employees, there will still be resistance to the change.

Comfort with the status quo is extraordinarily powerful. Fear of moving into an unknown future state creates anxiety and stress, even if the current state is painful. To help facilitate the change, managers and supervisors will need to help address resistance and mitigate it, but they should never be surprised by it.

Some Likely Sources of Resistance

- Employees invested in the current way of doing work
- Employees who created the current way of doing work that will be changed
- Employees who expect more work as a result of the change
- Those who advocated a particular alternative, say Option B, when Option A was ultimately selected
- Lack of awareness for why the change is needed
- Overload (Change saturation and limited change capacity)
- Fear of job loss and uncertainty | An employee’s personal, family or professional situation
- Lack of leadership support
- History with change (past failures / flavor of the month)

These types of employees and situations will likely be sources of resistance and should be addressed proactively

For more information, including:
What does resistance look like, what are the methods to address employee resistance, cost of resistance, click here

https://www.airiodion.com/resistance-management-plan/

Proactive Resistance Management

Use this slide to educate senior leaders and stakeholders on your plans to mitigate resistance. Delete if not needed. Delete this note.

Proactive resistance management is the early identification of likely or existing resistance, so it can be addressed upfront. A proactive approach leverages what we know about each impacted group organization (e.g., a history of being open or resistant to change), and what we know about the transformational itself (e.g., severe impacts, major changes, etc.).

As part of our proactive resistance management planning, we will seek answers to key questions, including:

- Are there known levels of resistance? Which groups? Why?
- Where do we expect resistance to come from in the future? From which groups? Why?
- What will resistance look like?
- How can we address and mitigate identified resistance before they have negative impacts on the project?

How We Will Proactively Identify Resistance:

- We will meet with select key stakeholders and impacted managers to identify existing and possible avenues of resistances within their groups, as well as potential resistance with other groups that they might be aware of
- Perform an organizational stakeholder readiness assessment and impact analysis to determine the scale and scope of the change milestones and deliverables. Higher impacts and wider scope often leads to higher resistance
- Meet with mid-level and senior-level managers to understand any concerns they might have
- Launch a Change Champion Network, if none exists, and leverage the network to identify potential points of resistance
- Send out surveys and questionnaires to gauge awareness of the program, as well as the desire or lack of desire (resistance) to support the program
- Direct employee feedback (via Q&A sessions / meetings / workshops),

The output from these discussions and workshops will be targeted resistance management planning, with actionable steps and activities, that will be documented in the Resistance Management Matrix Database and embed into the master change management plans

TEMPLATE
Resistance Management Matrix Database

SAMPLE
Resistance Management Matrix Database

https://www.airiodion.com/resistance-management-tool/

Reactive Resistance Management

Use this slide to educate senior leaders and stakeholders on your plans to mitigate resistance. Delete if not needed. Delete this note.

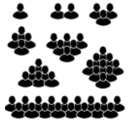
Reactive resistance management addresses resistance that could not have been anticipated or prevented, or when resistance is enduring or persistent.

How We Plan to Identify Resistance

Observation

Examples:
- Employees not attending awareness or other meetings
- Team leads ignoring the changes and not implementing the changes
- Employees not performing the new way, disengagement, putting up barriers
- Agreeing in public to do something (e.g., to send a needed project artifact), but not following up or doing as agreed, even after repeated reminders

Change Champions



Facilitate the help of change champions to identify resistance within their respective groups and departments

Managers

Meet with mid-level and senior-level managers to learn how their direct reports view the change, as well as understand challenges that they are facing with the change

Surveys

Send out questionnaires (surveys, polls, forms) to gauge awareness of the change and desire (or lack of) to support the change

Identified resistances will be documented in the Resistance Management Matrix Database with actionable steps and mitigation activities.

TEMPLATE
Resistance Management Matrix Database

SAMPLE
Resistance Management Matrix Database

https://www.airiodion.com/resistance-management-tool/

Mitigating Resistance

Use this slide to educate senior leaders and stakeholders on your plans to mitigate resistance. Delete if not needed. Delete this note.

In most cases resistance is best managed by the direct supervisor or highest level manager in the chain of command for the employee, group, or employees that are resisting the change. As such, we will work with managers, project sponsors, SMEs, change champions and key stakeholders to implement the resistance management process outlined below:

How We Plan to Mitigate Resistance

Diagnose

Diagnose the root cause of resistance (using the resistance assessment worksheet)

Address

Address the root cause of this resistance by involving managers, sponsors, change champions.

Addressing the issue might include:

1. Increase awareness communication
2. Emphasize the WIIFMs (What's in it for me)
3. Remove barriers
4. Provide simple, clear choices, and consequences
5. Show benefits in real tangible ways
6. Make a personal appeal
7. Convert the strongest dissenters
8. Communicate the consequences for not supporting the change.
9. Implement the consequences for not supporting the change.

Provide Ongoing Coaching & Support

Provide ongoing coaching opportunities and gather feedback from the employee or manager over a defined period of time.

Resistance Management Readout & Report

Use this slide to list your high risk resistors (groups and/or individuals) and resistance reasons. Note: This information is typically highly sensitive. Delete this note.

High Risk Groups & Individuals (Resistors)

1. -
2. -
3. -
4. -
5. -
6. -
7. -
8. -
9. -
10. -

Key Reasons for Resisting

- -
- -
- -
- -
- -
- -
- -

TRAINING

Impacted Employees That Need to be Enabled

Leverage this map to educate senior leaders and stakeholders on your training audience. Edit as you have for the previous maps. Delete this note.

Impacted frontline employees and managers

Sales
124 impacted users

Operations
465 impacted users

IT
124 impacted users

Procurement
461 impacted users

Finance
715 impacted users

Manufacturing
500 impacted users

Customer Service
124 impacted users

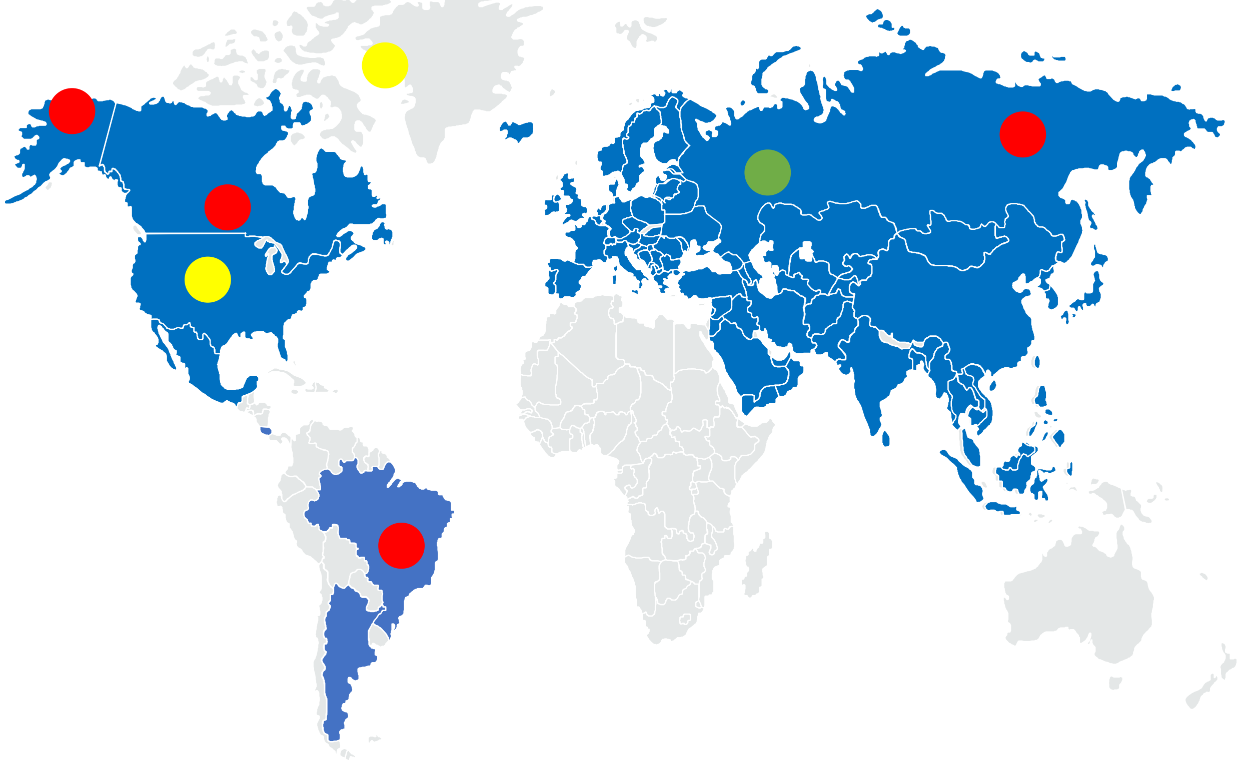
Front Office Supports
400 impacted users

Back Office Support
14 impacted users

Legal
11 impacted users

Compliance
51 impacted users

Total
Internal: 2,001 users | External: 988 users | Grand Total: 2,989 users



Impact Levels None | Low | Med | High

Low – Change is minimal
- *No process, system, or behavioral changes required*
- *Awareness of high level changes needed*
- *Primary impacts are to workload*
- ***Training:** Typically handled through communications or short video explanations*

Medium – Change is moderate
- *Moderate process, technology or behavioral changes required*
- *Understanding of changes required*
- *Task changes will be at moderate difficulty level*
- ***Training:** Typically handled by videos and self-based training*

High – Change is substantial
- *Substantial process, technology or behavioral changes required*
- *Required to be SMEs on changes and new concepts*
- *Fundamental job/skills shift*
- ***Training:** Typically handled by videos, self-based training, and reinforcement sessions*

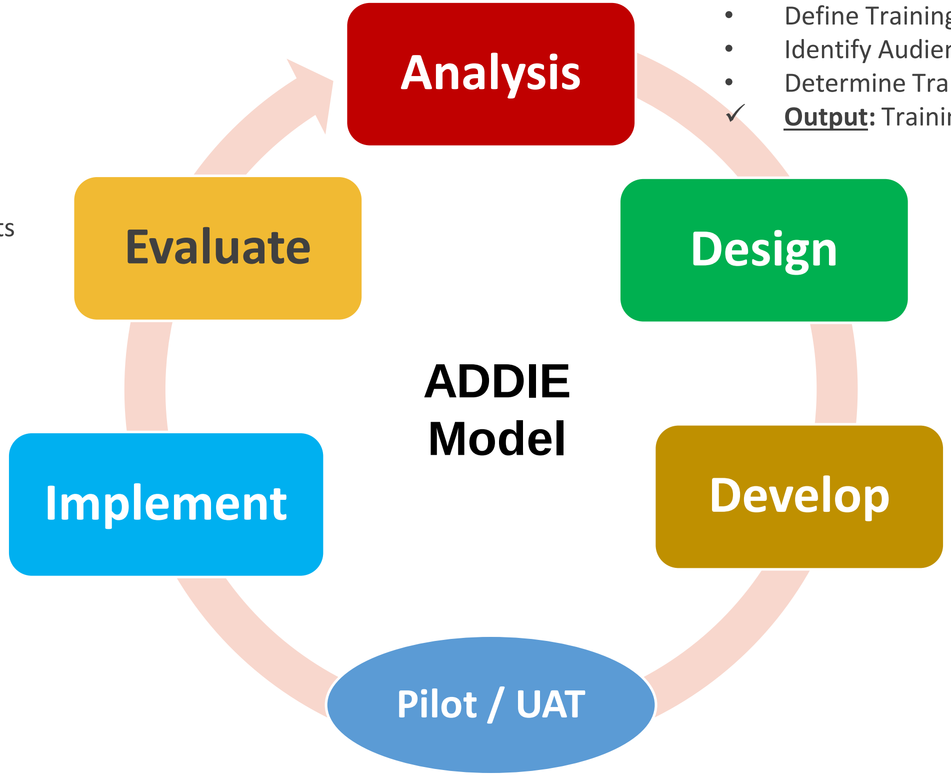
Training Strategy

Use this slide to educate senior leaders and stakeholders on your training strategy and edit where appropriate.
Delete if not needed. Delete this note.

For training, we will apply a mix of training channels (Web based training, instructor led learning, online resources, recorded sessions, and train the trainer sessions) and an iterative multi-prong model.

This strategy will allow us to provide the broadest, customizable, and most efficient levels of training, based on end-user (trainees) needs, availability, and preferred training style.

Training Operating Model



Analysis

- Define Training Objectives, Timeline & Milestones
- Identify Audience, Including Pilot Audience | Assess Existing Skills and Readiness
- Determine Training Delivery Channels
- ✓ **Output:** Training Matrix Database & Plan Completed

Design

- Create Storyboards/Curriculum
- Design Training Program
- Design Training Prototype & Props
- ✓ **Output:** Training Program & Tools Designed

Develop

- Build Training Prototype for Pilot
- Build Training Prototype for Full Scale Rollout
  [Developing the prototypes will include creating course curriculum and end-to-end testing and training scripts (business & technology process flow/user stories), learning outcomes, method of delivery, props (documents, tools, software, learning application or website), and testing procedures.]
- **Output:**
  - ✓ Training Program & Tools Developed (Pilot/UAT)
  - ✓ Training Program & Tools Developed (Full Scale)
  - ✓ Procedure for Training Facilitators and Learners is Developed

Pilot / UAT

- Schedule and Conduct PILOT / UAT Training
- Document Lessons Learned and Gather Feedback
- Train-the-Trainers/Facilitators

Implement

- Integrate Lessons Learned From Pilot to Full Scale Training Program
- Schedule the Training Sessions
- Rollout the Full Scale Training

Evaluate

- Measure Effectiveness
- Adoption Measurements
- Feedback Analysis

Training Channels

Use this slide to educate senior leaders and stakeholders on your training channels. Delete if not needed. Delete this note.

Instructor Led Training

Online Resources

New Job Aids & Procedures

Web Based Self-Training

Train-the-Trainer

Recorded Sessions

Training Process

Use this slide to educate senior leaders and stakeholders on your training process. Delete if not needed. Delete this note.

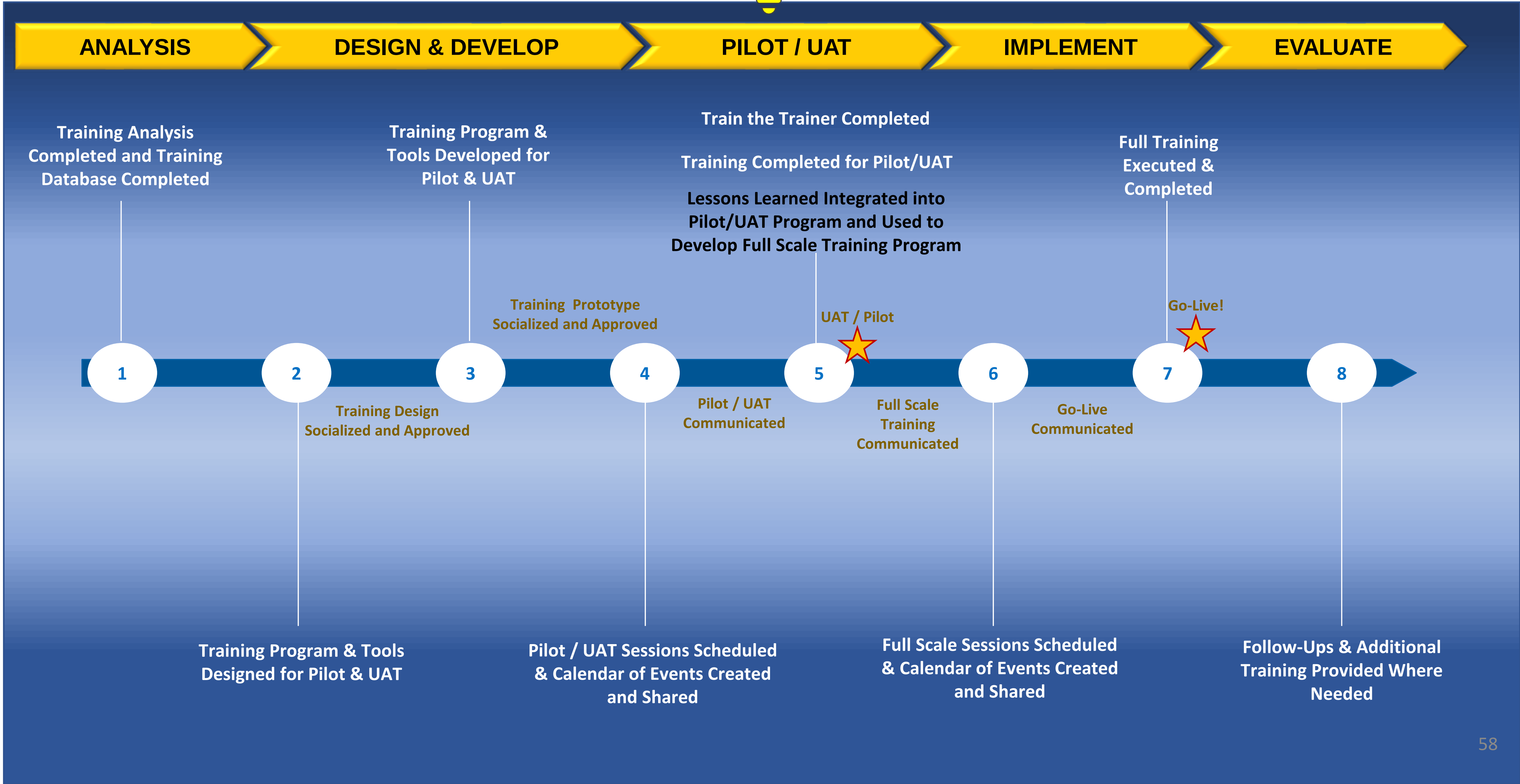
For our training development and execution, we will apply a structured training process, including some or all of the steps outlined below. A **training pilot** will be conducted to align with the program UAT before the training program will be rolled out across the general training population. A pilot is a best practice process that allows us to test out the training and get direct feedback from end-users.

Training Process

1. Conduct Change & Training Assessments
2. Gather List of Trainees, Training Needs & Training Requirements
3. Develop Training Matrix/Plan
4. Identify Creators of Training Content & Props
5. Socialize Training Plan with Key Stakeholders & Program Team
6. Get Agreement, Integrate Feedback, Finalize Training Plan
7. Build Training Materials, Props, and Curriculum
8. Develop Training Roadmap & Calendar Schedule
9. Contact Managers of Trainees & Socialize the Training Roadmap
10. Schedule the Training Sessions — *Train-the-Trainers, Pilot, Full Training*
11. Execute the Training Sessions — *Train-the-Trainers>Pilot>Full Training*
12. Measure the Effectiveness of the Training
13. Coach Trained Employees and Increase Proficiency
14. Follow-Up to Determine Additional Training / Coaching Help
15. Where Needed, Provide Additional Training
16. Conclude Training Program. Perform a Post Mortem

Training Milestones

Use this slide to educate senior leaders and stakeholders on your training milestones. Delete if not needed. Delete this note.



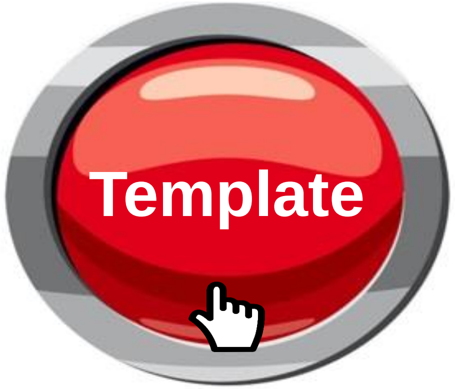
Training Matrix

Use this slide to educate senior leaders and stakeholders on your training program matrix. Delete if not needed. Delete this note.

A detailed Training Plan Matrix will be developed for our training execution. The Matrix will include names of trainees, trainers, what needs to be trained, deliverable channel, training data and timing, training location, and other information needed for a successful training implementation.

Training Matrix Database

#	Trainee Name	Job Title / Role	Department	Training Requirements / Needs	Training Topic	Training Goals	Required Competency	Current Competency	Vill This Trainee be Part of Pilot or Full Scale Training Audience? Training Pilot?	Full Scale Training	Delivery Channel	Training Date
1	John Doe	QA Specialist	Quality & Continuous Improvement	1. Training to use the Oracle Cloud Platform	New business processes and solutions	Train user to become proficient in using the new business processes and technology solution	Know how to access the system and use the new business processes	Employee can access the new system but does not know how to use the new business processes	Y		1. Instructor Led Training 2. New Job Aids & Procedures	5/28/18
2	Jane Doe	Sourcing Business An	Sourcing	1. Training to use the Oracle Cloud Platform	New reporting process	Train user to become proficient in using the new business processes and technology solution	Use the reporting system tool to create new reports	Can use the new reporting tool, but does not have full proficiency in using all the features	Y		Instructor Led Training	6/12/18
3	Judith Doe	Sourcing Manager	Sourcing	1. Training to use the Oracle Cloud Platform	New knowledge and skills on conducting financial analysis	Train user to become proficient in using the new business processes and technology solution	Use the system to perform sourcing job roles	Can perform sourcing job roles, but does not know how to use the new system		Y	Instructor Led Training	6/12/18
4	Michael Doe	Operations Specialist	Global Operations	1. Training to use the Oracle Cloud Platform	New logistic processes and procedures	Train user to become proficient in using the new business processes and technology solution	Know how to access the system and use the new business processes	Employee can access the new system but does not know how to use the new business processes		Y	1. Instructor Led Training 2. Online Resources 3. Recorded Sessions	6/12/18
5	Cane Doe	Supply Chain Logistic	Returns	1. Training to use the Oracle Cloud Platform	New business processes and solutions	Train user to become proficient in using the new business processes and technology solution	Know how to access the system and use the new business processes	Employee can access the new system but does not know how to use the new business processes		Y	Web Based Self-Training	6/12/18
6	Sarah Doe	Specialist	IT	1. Training to use the Oracle Cloud Platform	New business processes and solutions	Train user to become proficient in using the new business processes and technology solution	Use the system to perform sourcing job roles	Can perform sourcing job roles, but does not know how to use the new system		Y	Web Based Self-Training	6/12/18
7	John Doe	Pending	ABCXYZ Dept	1. Training to on new business processes and procedures 2. Training to use the Oracle Cloud Platform	New business processes and solutions	Train user to become proficient in using the new business processes and technology solution	Pending	Pending		Y	Train-the-Trainer	6/12/18
8	Jane Doe	Pending	Sales Support	1. Training to on new business processes and procedures 2. Training to use the Oracle Cloud Platform	New business processes and solutions	Train user to become proficient in using the new business processes and technology solution	Pending	Pending		Y	Recorded Sessions	6/19/18
9	Judith Doe	Pending	ABCXYZ Dept	1. Training to on new business processes and procedures 2. Training to use the Oracle Cloud Platform	New business processes and solutions	Train user to become proficient in using the new business processes and technology solution	Pending	Pending		Y	Recorded Sessions	6/19/18
10	Michael Doe	Pending	ABCXYZ Dept	1. Training to on new business processes and procedures 2. Training to use the Oracle Cloud Platform	New business processes and solutions	Train user to become proficient in using the new business processes and technology solution	Pending	Pending	Y		New Job Aids & Procedures	6/19/18
11	Cane Doe	Pending	Returns	1. Training to on new business processes and procedures 2. Training to use the Oracle Cloud Platform	New business processes and solutions	Train user to become proficient in using the new business processes and technology solution	Pending	Pending	Y		New Job Aids & Procedures	6/19/18



“1 Pager” Training Plan

Use this slide to educate senior leaders and stakeholders on your training plans for EACH audience – edit per your training details and copy and reuse this slide for other audiences.
Delete if not needed. Delete this note.

Training Goals:

- Enable users to use Oracle Cloud solution to create, maintain, and consume financial, procurement, and product data.

Scope:

- Training to use the Oracle Cloud Platform

Out of Scope:

- Assessing validity of the new platform

Metrics/Success Criteria:

- X % complete training
  - (Did we reach critical mass of my target audience?)
- Comprehension via quizzes within the training material
  - (Can the trainees successfully articulate the key concepts trained?)
- Continuity via count of escalations
  - (Post go-live, escalations to program team, IT calls/tickets, email escalations)
- Direct feedback from frontline managers (FLMs)
  - (Post go-live, FLMs know who is struggling and who is a super user)

Audience Size & Location:

- Internal: *Pending*
- External Customers: *Pending*
- Other: ______

Materials:

- New business and technology procedures and job aids
- Overview of why the change is happening and what is changing for the trainees
- AS-IS/TO-BE process changes if needed
- Information on where trainees can get help (initial launch)
- Online job aids (i.e. Glossary) for initial launch and post-go-live sustaining

Content Medium:

- PowerPoint, Self-serve, hands-on in test environment

Delivery Method:

- Virtual Instructor-Led with Skype recording of training
- eLearning (web-based training)
- Simulations/games
- Recorded Sessions/videos
- Super User coaching

Training and Support Resources:

- Training Content Creators: *BAs*
- Trainers: *BAs, SMEs*
- Support Resources: *SMEs, BAs, Super User(s), Command Centers, Office Hours, Company Website*

Measuring Training Success

Use this slide to educate senior leaders and stakeholders on how you plan to measure your training successes. (See other slides below that cover measurement and tracking) Delete if not needed. Delete this note.

In evaluating the effectiveness of the training delivery, information will be sourced from the following areas:

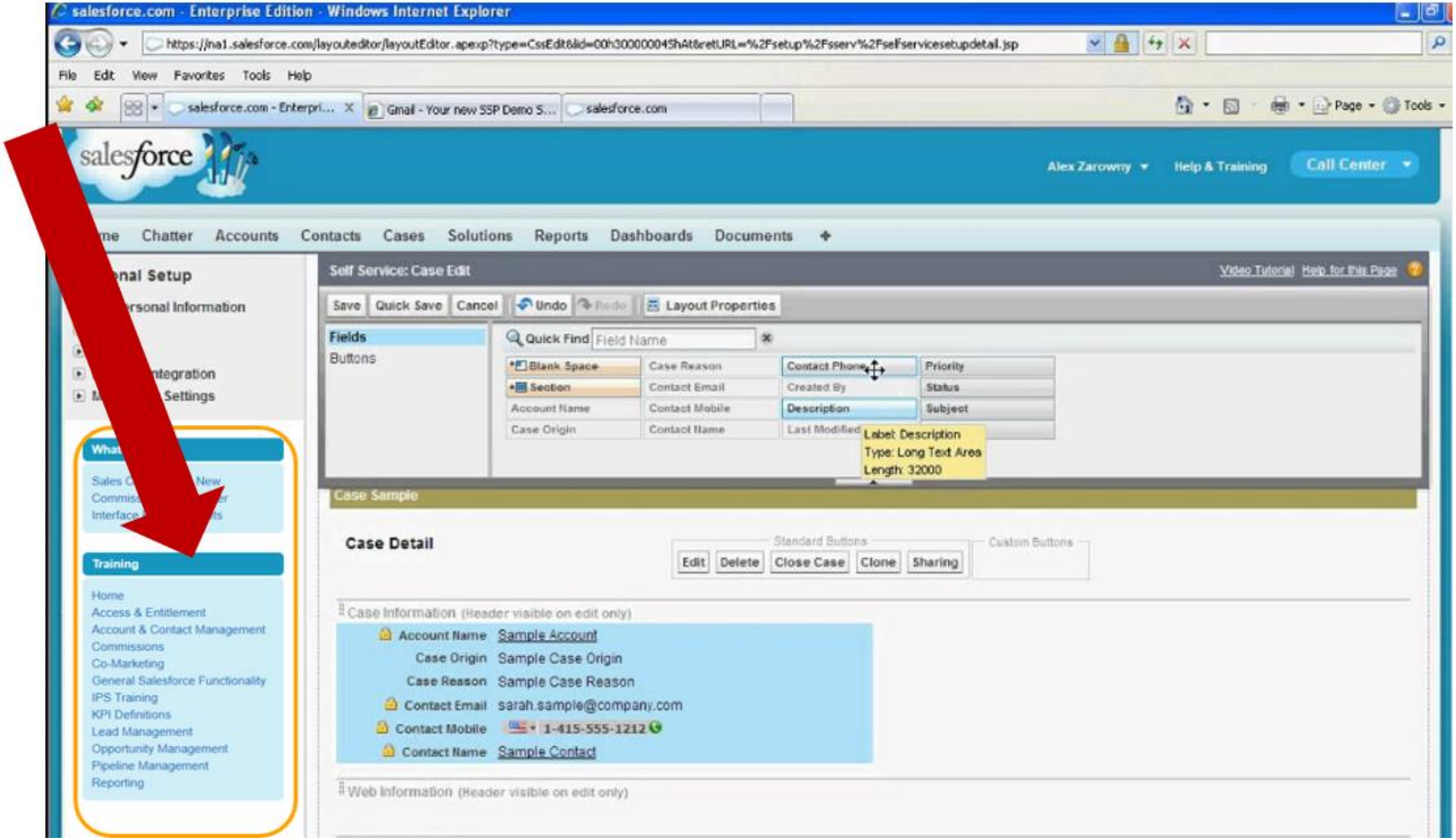
- Feedback from trainers on training problems or individuals who experienced learning difficulties
- Number of trainees that have completed the training. 75% and more will be considered a success
- Comprehension via quizzes within the training material to determine if trainees can successfully articulate the key concepts on which they are being trained
- Continuity via count of escalations - Post go-live, escalations to program team, IT calls/tickets, email escalations
- Direct feedback from frontline managers (FLMs) - Post go-live, FLMs know who is struggling and who is a super user

To support the evaluation process, trainees will be provided with surveys and questionnaires (hard copy or online completions) to complete an evaluation survey. This will be used to measure the reaction of trainees post-training.

Sample Training Examples

Use the following slides as examples for your training delivery tools / types. Delete any that are not needed. Delete this note.

Example of Self-Serve Training in Salesforce



Example of Online Resources On a Firm’s Site

MENU TRAINING INDUSTRY

Topics Certifications Courses

OFFERED ONCE PER MONTH	2 HALF-DAYS, PLUS CASE STUDY	FUNCTIONALLY SPECIFIC FOCUS	FOR L&D PROFESSIONALS	VIRTUAL

When you attend a certificate program, you will gain the relevant knowledge and skill sets needed to manage training in support of specific functional areas. In addition, attendees receive a certificate of achievement reflecting their newly gained knowledge, skills and abilities related to the program focus and a digital badge to share on their social media platforms.

CONTINUING PROFESSIONAL DEVELOPMENT

LEADING LEADERSHIP DEVELOPMENT CERTIFICATE

In the Leading Leadership Development certificate course, you will discover strategies to successfully manage your organization’s leadership development

CONTINUING PROFESSIONAL DEVELOPMENT

MANAGING LEARNING TECHNOLOGIES CERTIFICATE

In the Managing Learning Technologies certificate course, you will learn how to select, manage and evaluate various training and development

Categories

ELEARNING | ELEARNING TIPS | CORPORATE TRAINING | SHIFT NEWS | INSTRUCTIONAL & GRAPHIC DESIGN | ELEARNING DESIGN | INSTRUCTIONAL DESIGN | MOBILE LEARNING | INDUSTRY TRENDS | MLEARNING | BRAIN LEARNING | HTML5 | ELEARNING EVENTS | ELEARNING BENEFITS | PROJECT MANAGEMENT

SEE ALL

Sample of a Training/Educational Email

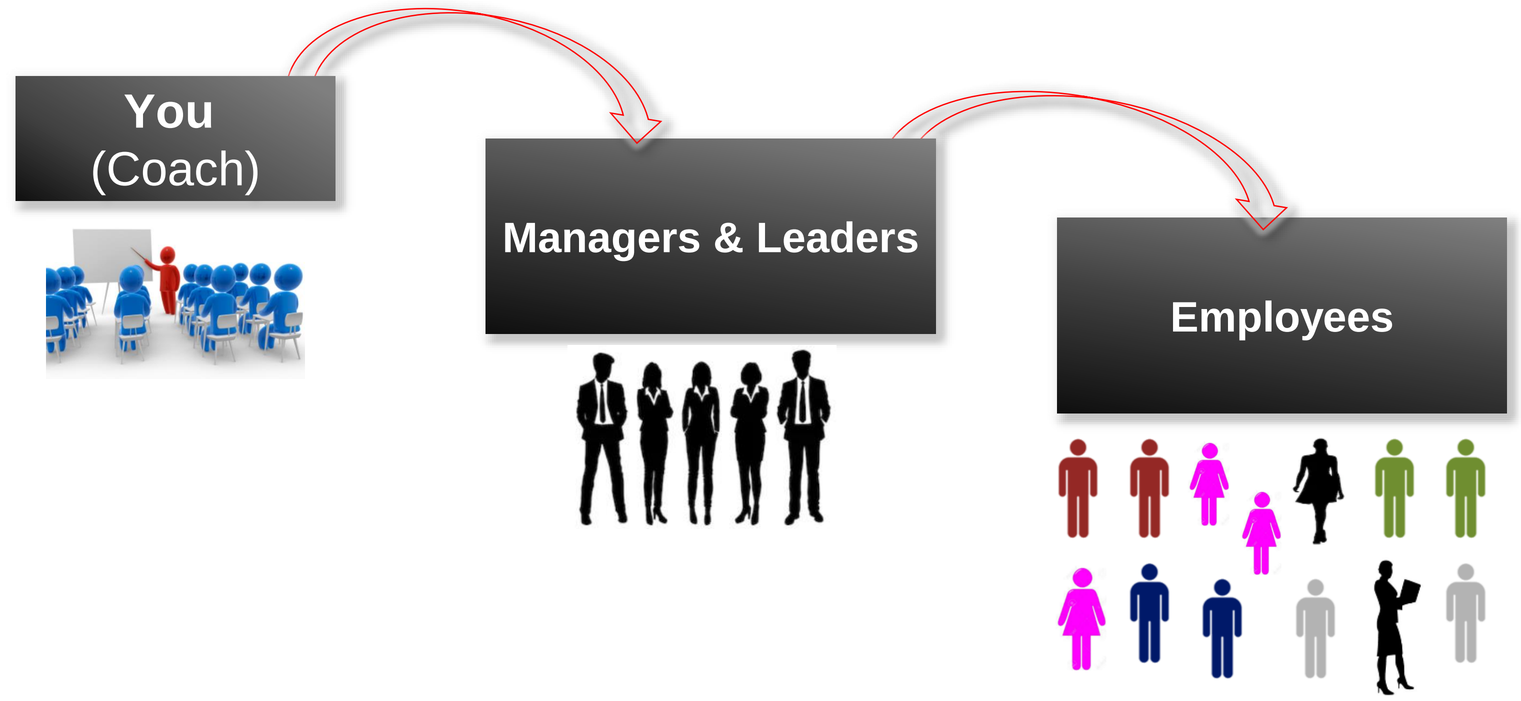
Get the most out of your mobile device at Viper
Learn what's best and what *not* to do

Now that you have registered and set up your mobile device for Viper here are some key points to help you use it most effectively.

Calendar	**Do not manage your Viper calendar from your mobile device.** If you do, calendar items can inadvertently be deleted, attendees can be dropped, or calendar headers can be truncated. To avoid these potential issues, rpocess all meeting requests from your computer Inbox. See more do's and don'ts
Using KNOX	• Setting preferences and other tasks • Sharing contacts /calendar items between personal and corporate • Using Viper business apps • Activate Viper' Trusted Apps Portal (Intel® TAP) • Using Skype for Business and Viper TAP • Using Syncplicity and WebEx
Back up your data	Whether you have a personal or corporate device, it's important to back up your data regularly. View IT's recommendations for data storage, backup, synchronizing and sharing between devices.
More topics	Visit the Mobile Devices site for information on managing travel costs, Employee Hotspot guidelines, *Digital* Edge tips, and more.
Where to get help	Visit the Technical Assistance Center (TAC) at Viper to: • Search self-help topics, find known issue workarounds, or chat with a technical

COACHING

COACHING PROCESS



Coaching Plan

Use this slide to educate senior leaders and stakeholders on your coaching plan. Delete if not needed. Delete this note.

Coaching is a vital part of successful change management. Decades of change research has identified employee resistance as a top obstacle to change. The influence that a supervisor or manager has on front-line employees is immeasurable.

Coaching during a time of change provides a venue for one-on-one and group meetings between employees and the people they trust the most: **their immediate supervisors**. This environment allows employees to ask questions and receive clarification about the change and to comment on their specific worries and concerns about change. It is also an opportunity to gather feedback from the front-line employees about the change and the change management efforts.

As part of our change management strategy, we will work with frontline managers to support them in coaching their direct reports to alleviate many of the reasons for resistance and build support for the change throughout the organization.

Our coaching plan will define our approach for supporting managers and supervisors during the change.

Our role will be to fully enable managers and supervisors to:

Sponsor the change

Support their employees during the change execution (Pre Go-Live and Go-Live)

Support their employees in the new, changed environment (Post Go-Live)

Enabling Managers to be Effective Change Management Coaches

Use this slide to educate senior leaders and stakeholders on your coaching plan. Delete if not needed. Delete this note.

In coaching frontline managers, we will apply a multi-step approach:

Step 1. Identify Key Managers That Are Critical To The Transformation

We will work with the program team and primary sponsors and also conduct stakeholder impact assessments to identify, (A) Executives, Leaders, and Managers needed to support the program, and (B) Senior Managers and Leads within the impacted organizations who are considered critical stakeholders.

Step 2. Assess Managers' Change Management Competencies

After identifying these critical managers we will engage them, educate them on the transformation program, and assess their OCM competencies, as well as their desire to support or resist the transformation and document this information in a Sponsor & Stakeholder Database. (NOTE: this assessment is typically not widely shared).

Name	Title	Dept.	Sponsor's OCM Competence Level	Sponsor's Receptiveness to the Change
John Doe	Director	Digital Business Enabling	3	4
Jane Larry	Sr. Director	Supply Demand	2	5
Carol jane	Managing Director	Global Marketing and Communications	1	4
Larry Jone	Senior Vice President	Sales	4	3
Vic Rahish	Director	Sports, New Technologies & Olympic Games Marketing	2	2

Assessing the managers' change management competency will be performed to find out which managers need coaching or additional change management support to be a good sponsors of the change.

Enabling Managers to be Effective Change Management Coaches (2)

Use this slide to educate senior leaders and stakeholders on your coaching plan. Delete if not needed. Delete this note.

Step 3: Develop Coaching Plans That These Managers Can Use To Coach Their Direct Reports Through The Change

For those managers with mid-low change management competencies, we will develop a customized coaching plan to educate and coach them. For managers with high change management competencies, we will follow up with them on a regular basis to see if they need any change management support or help

Step 4: Ongoing Coaching Support

We plan to provide ongoing follow-ups and coaching to these managers to help increase the success of their coaching efforts.

TRACKING & MEASUREMENT

Tracking & Measuring Change Management Adoption

Use this slide to educate senior leaders and stakeholders on your tracking/measurement plan. Delete if not needed. Delete this note.

For change to be successful, impacted users need to have:
1. Awareness of the change
2. Desire to support the change
3. Knowledge on how to change
4. Action: Proficiency in using future state business processes, procedures, job aids and policies, and new solutions
5. Reinforcement: Change sustenance

To increase change adoption and the success of the transformation, our change management tracking and measurement efforts will be focused on the five ADKAR areas above.

Employee Change Milestones

Stages employees and impacted users (customers, partners, etc.) have to go through as part of their transition

1 **Awareness**

2 **Desire**

How to Achieve

Change management efforts that need to be executed to help end users through their transition

1. Send out awareness communications:
   - To educate employees and impacted customers on the program (why we are changing, why now, risk of not changing, benefits, and other awareness information (emails, newsletters, internal social media, blogs, etc.)
   - To build employee desire to support the program
2. Engage with employees via workshops, townhalls, roadshows, meetings, 1-on-1s, webinars, and other channels to communicate the impacts to processes and legacy solutions, and to build desire and support
3. Solicit change champions, managers, and key stakeholders for their help in cascading communications, and engaging with end users to facilitate understanding, buy-in, and support for the change

How to Track & Measure

How we will track the effectiveness of our change activities, which will be based on how well employees are transitioning through the change and adopting the new solutions and processes

1. Draft and send out **surveys and questionnaires** to end users to measure how aware they are of the change, and how much desire and support they have for the change
2. **Meet with managers and change champions** to get their input on “water cooler employee conversations” on the change, as well as getting feedback from what they are hearing from end users about the change
3. **Track number of users** that are opening and reading the awareness communications to gauge engagement with and effectiveness of the communications. Also track number of questions, concerns and feedback that are coming in from end users to gauge how well end users are interacting with the communications
4. Ask for and **get direct feedback** from end users during engagement sessions (ask questions to gauge ADKAR)

Tracking & Measuring Change Management A

Use this slide to communicate your tracking/measurement plan. Edit where needed. Delete if not needed. Delete this note.

Employee Change Milestones

Stages that employees and impacted users (customers, partners, etc.) have to go through as part of their transition

3 **Knowledge**

4 **Proficiency**

5 **Change Sustenance**

How to Achieve

Change management efforts that need to be executed to help end users through their transition

1. Design, develop and execute training programs and train end users to help them build knowledge of the new processes and solutions
2. Provide opportunities (e.g., a test environment, materials, online educational resources) for employees to practice and learn at their own pace
3. Follow up with end users and provide coaching or additional training, as needed
4. Have a “Help System Network” in place (e.g., help desk subject matter experts, support team, points of contacts and a change champion network) that employees can contact for additional help in learning the new processes and solutions
5. Follow up with end users to provide additional coaching and training as needed
6. Celebrate quick wins, individual efforts and program successes

How to Track & Measure

How we will track the effectiveness of our change activities, which will be based on how well employees are transitioning through the change and adopting the new solutions and processes

1. We will **measure the relevance and usefulness** of the training via surveys, questionnaires or talking to learners during, and after the training to collect their feedback.
   - Topics to cover :
     - Was the course content relevant and easy to follow.
     - Ask questions about the learnings and key takeaways.
     - Discuss the strengths and weaknesses of the program.
     - Understand if the training was able to accommodate the learner’s pace and learning style.
   - At the end of Level 1, you should have a good understanding of understand how well the training was received and determine any gaps in the training content.
2. We will **measure the knowledge and skills gained by learners** as a result of the training.
   - To measure this level, we will use a combination of metrics such as:
     - Test scores during and after the training
     - Evaluation of applied learning projects
     - Course completion and certification
     - Supervisor report and feedback
   - At this stage of evaluation, we will be able to determine if the training is meeting its set objectives, what are the specific skills that can be developed with this training, and the scope for improvements in content and method of delivery.
3. We will follow up to **measure how the training has impacted the learner’s performance** using: Self-assessment questionnaires; Informal feedback; Focus groups; On-the-job observation; Actual job performance key performance indicators (KPIs); Customer surveys, comments, or complaints
4. **We will meet with managers and change champions** to get their input, as well as getting feedback from what they are hearing from end users about knowledge and proficiency levels
5. **Track number of users** that are utilizing the Help System Network to gauge effectiveness of the Network.
6. Also track number of **frequently asked questions** being asked. Provide answers to these questions using an online FAQ page that is accessible by all end users
7. Ask for and **get direct feedback** from end users during engagement sessions (ask questions to gauge knowledge and proficiency)
8. **Track usage** of new processes and systems, identify and document performance gaps or lack of usage

Measurement & Tracking Dashboard

Use this slide to communicate tracking/measurement dashboard. Edit where needed. Delete if not needed. Delete this note.

A KPI change adoption tracking dashboard will be created and used as part of our tracking, measurement and reporting efforts.

Progress Tracking Over Time - Change Adoption

Dashboard

SCORECARD

Impacted Sub Group	Date Tracked	Awareness	Desire / Buy-In	Knowledge	Proficiency	Sustenance
Accounting	1/15/2019	Mid	Mid	Mid	Mid	Low
	2/20/2019	Mid	Mid	High	High	Low
	3/15/2019	High	Mid	High	High	Mid
Customer Sales	1/15/2019	High	Low	Low	Low	Low
	2/20/2019	High	Low	Mid	Mid	Mid
Demand Planning	1/15/2019	High	High	Mid	Low	Low
	2/20/2019	High	High	High	Mid	Low
Help Desk	1/15/2019	Mid	High	Mid	Mid	Mid
	2/20/2019	High	High	High	Mid	Mid
IT Offshore	1/15/2019	Mid	Mid	Mid	Mid	Mid
	2/20/2019	Mid	Mid	Mid	Mid	Mid
IT Support	1/15/2019	High	High	High	High	High
	2/20/2019	High	High	High	High	High
Logistics	1/15/2019	Low	Low	Low	Low	Low
	2/20/2019	Low	Low	Mid	Mid	Low
Operations	1/15/2019	High	Low	Mid	Mid	Mid
	2/20/2019	High	Low	High	Mid	Low
Reporting	1/15/2019	High	High	High	High	High
	2/20/2019	High	High	High	High	High
Revenue Operations	1/15/2019	High	High	High	High	High
	2/20/2019	High	High	High	High	Mid
Sales Operations	1/15/2019	High	High	High	High	Mid

Change Adoption Tracking

SCORECARD

Dashboard

Awareness

Date Tracked	Awareness	Total
1/15/2019	High	8
	Low	1
	Mid	4
2/20/2019	High	10
	Low	1
	Mid	2
3/15/2019	High	1
Grand Total		27

Desire / Buy-In

Date Tracked	Desire / Buy-In	Total
1/15/2019	High	6
	Low	5
	Mid	2
2/20/2019	High	7
	Low	4
	Mid	2
3/15/2019	Mid	1
Grand Total		27

Knowledge

Date Tracked	Knowledge	Total
1/15/2019	High	5
	Low	2
	Mid	6
2/20/2019	High	10
	Mid	3
3/15/2019	High	1
Grand Total		27

Proficiency

Date Tracked	Proficiency	Total
1/15/2019	High	5
	Low	4
	Mid	4
2/20/2019	High	6
	Mid	7
3/15/2019	High	1
Grand Total		27

Sustenance

Date Tracked	Sustenance	Total
1/15/2019	High	4
	Low	5
	Mid	4
2/20/2019	High	4
	Low	4
	Mid	5
3/15/2019	Mid	1
Grand Total		27

Corrective Actions & Change Sustenance

Use this slide to communicate corrective actions & change sustenance. Edit where needed.
Delete if not needed. Delete this note.

We will coordinate with project teams, change champions, sponsors, key stakeholders and mangers to apply correction actions to remediate any identified process adoption issues, concerns, roadblocks, or resistance.

We will work to develop and implement interventions when needed, and capture and apply lessons learned to achieve continuous improvement.

Throughout the transformation timeline, we will provide change adoption progress reports to senior executives, key stakeholders, sponsors, and project team members.

CHANGE CHAMPION NETWORK

Stand Up a Successful Change Network

Use this slide to communicate the importance of a successful change network. Delete if not needed. Delete this note.

Research shows that people get through organizational change by relying on their relationships with others in the workplace. While leaders play a key role in ensuring successful change, people need an informal place to share their fears and concerns in order to commit to the change later on.

A change network consists of change agents, often called change champions, which are individuals across impacted groups who will advocate for the change.

Standing up a change network requires an upfront investment, but champions are true differentiators in driving change adoption.

The role of a change champion is very important because these individuals will be helping to manage the inevitable ambiguity and uncertainty associated with implementing change.

Additional benefits include:

- Reducing the pressure on the centralized transformation team to deliver change;
- Identifying issues on the ground and raising them quickly to the change and project teams;
- Gathering feedback on the communications campaign and feedback to the change team;
- Identifying key resistors of change;
- Assisting with managing resistance to change amongst their colleagues;
- Becoming super users and therefore assist in training of other users.

Process for Standing Up the Change Champion N

Use this slide to communicate your change network plan. Delete if not needed. Delete this note.

In standing up, launching and managing the change champion network, we will apply the process outlined below.

Change Champion Network Process

Define the Roles and Responsibilities

Sample Roles Include:
- *Understanding the change impacts on employees and colleagues*
- *Assist with disseminating communications*
- *Become early adopters / super users of "system X"*

Define the Criteria for Selection

Sample Criteria:
- *Respected and liked by peers*
- *Good interpersonal skills*
- *Committed to the success of the organization (desire to make a difference)*
- *Flexible and courageous in speaking up for what they believe*

Provide an Overview to the Leadership Team, and to Managers of Impacted Groups

KEY TALKING POINTS

- Why establish a Change Agent Network
- Role and responsibilities of the Change Agents in the network
- How Sponsors should identify and select Change Agents
- Why Change Agents need to be great communicators with good analytical skills
- How to identify and leverage key influencers
- The accountability of Sponsors
- Change Agents and performance goals

When asking management to volunteer resources as change champions, it is useful to present the criteria and roles to enable them to make faster decisions on which employees to involve as champions. This also ensures that managers are on-board and supportive of the champion network

Ask the Managers to Volunteer Candidates

After the overview session, provide a mechanism and a deadline for managers to submit their champion nominees. Champions must see their role as a good opportunity and not something being forced on them. One way to accomplish this is for managers and senior leaders, rather than the project/change team, to communicate to champions that they have been nominated and explain that it's an honor to be selected as a change champion and highlight the characteristics that contributed to each person's nomination.

Follow Up with Volunteered Candidates to Get Commitment

- *How many champions are needed? A ratio of 1 champion for every 60 impacted end users is normal. This allows the flexibility to support the full group of end users without causing significant resource drain*
- *Time commitment per champion? Commitment ranges from 5-10% of a person's job (2-4 hours per week).*

Kick Off the Change Network

Sample Agenda:
- *Explain the Change (including benefits)*
- *Review the Change Strategy & explain the purpose and expected contribution of a Change Network. Deep dive into roles & responsibilities*
- *Discussion: How can we best engage end users?*
- *Next Steps / Actions / Asks*

Manage the Change Champion Network

- *Communicate the launch of the champions' network to the organization and to senior leaders*
- *We might meet less frequently in beginning project stages when the purpose is to build awareness, and more frequently as we prepare champions for their role during deployment. We will share a schedule ahead of time to ensure maximum participation.*
- *Meeting Content: In the beginning, we will cover items such as the project scope, purpose, benefits, and challenges, and will progress into more detailed reviews of the change and its impacts, system demonstrations, training plans, and most importantly, a continuous explanation of the change champion's role at each stage.*

Reward and Recognize the Change Champions

Additional Resources

This slide is for informational purposes, you can delete it once it is no longer needed.

Below are additional resources if you would like to learn more about best practices and strategies for standing up a change champion network.

Tutorial - Creating Change Champions in Your Organization

Tutorial - Change Champion Network Plan & Guide

CHANGE REINFORCEMENT

Reinforcing the Change

Use this slide to communicate how you will reinforce the change. Delete if not needed. Delete this note.

Reinforcement is critical to the success of all initiatives because people have a natural tendency to sometimes revert back to what they know and are comfortable with (e.g., developing workarounds to the new solutions). To sustain the change, we will apply a structured change reinforcement approach

Change Reinforcement and Sustainment Activities

Track & Measure | Collect & Analyze Feedback → **Diagnose Gaps & Issues** → **Implement Corrective Actions and Celebrate Successes**

Track & Measure | Collect & Analyze Feedback

Track the success of change management activities by measuring adoption (awareness, desire to support the change, knowledge of the future state processes and job aids, and proficiencies) and usage of the new processes.

Employee Feedback:

Tracking the success of change adoption involves gathering feedback from employees using surveys, speaking with managers and change champions.

Key types of feedback include:

- **Formal** - formal feedback is organized and facilitated. This includes structured team meetings, Q&A, sessions, web-forms, etc.
- **Informal** - informal feedback is gathered by word of mouth. Informal includes elevator discussions, water cooler, general email, etc.
- **Proactive** - proactive feedback is when you go out looking for input.
- **Reactive** - reactive feedback is when we receive feedback without searching for it. Complaints are a common source of reactive feedback.

Audit Compliance & Monitor Adoption:

- Monitor system usage
- Monitor how the new business processes are being used, as well as how often the "old way of doing things“ is still being used

Diagnose Gaps & Issues

1. Collect employee feedback and compliance information that you have gathered.
2. Analyze the data. Look for patterns and themes.
3. Prepare summaries of key findings.
4. Organize the employee feedback and compliance findings so it can be quickly and easily understood.
5. Evaluate the overall effectiveness of the change management program and identify any weaknesses.

Implement Corrective Actions and Celebrate Successes

1. Work with the project team and managers to resolve any new points of resistance
2. Follow up with trainees and business unit managers to identify additional training needs
3. Follow up with managers to identify post-deployment issues
4. Work with necessary parties to resolve issues and roadblocks
5. Celebrate quick wins and early successes
   - Constantly seek out evidence of progress in the project.
   - Watch for the achievement of major milestones and identify early successes even if small.
   - Organize ways to recognize groups and individuals that have achieved success. Make it public.
   - Use normal staff meetings or regularly scheduled department meetings as an avenue for recognition of achievement.
   - Ensure that key stakeholders are aware of these achievements and involve managers in the chain of command to award these recognitions.

Change Management Transition

Use this slide to communicate how you will handle the change management transition. Delete if not needed. Delete this note.

At the end of any transformation, there has to be a transfer of responsibilities from the change management team to a designated group that will be determined by the program leads. A designated group might be a group within HR, Program Manager(s), Center of Excellence Group, etc.

For small projects, such a transition will be a minor transition. For large projects, the steering committee might need to be involved as such a transition will require careful management.

Discussions and interviews with the primary sponsor and the steering committee will be held to:

- Inform them that plans to transfer ownership for the change to operational managers are being developed
- Determine what outstanding issues need to be addressed prior to the change management team being dissolved
- Work out an acceptable timetable for the transition to occur

The primary sponsor or steering committee will ultimately make the transition decision based on how well the project is doing and what further responsibilities they envision for the change management team.

A Change Management Transition Plan will be developed as part of the transition

Change Management Transition Plan

Use this slide to communicate your change management transition plan. Delete if not needed. Delete this note.

A change management transition plan is a document that lays out the tasks and activities to be performed to efficiently transition the change management program from the implementation phase to the maintenance phase.

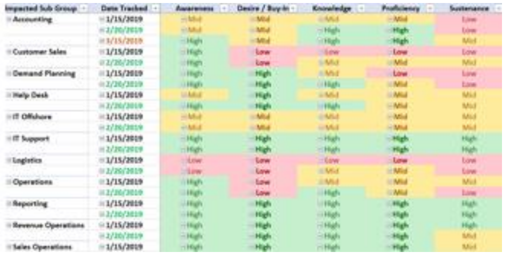
The transition plan identifies the BAU (Business-As-Usual) resources that will be responsible for managing change activities to sustain the change. It will also include the tools, techniques, and methodologies required for change sustenance, as well as the ongoing activities that need to be performed to ensure the change is sustained.

An impact statement is formulated in the plan that outlines the potential impact of the transition to the existing infrastructure, operations and support team, and to end users.

Plan

Identify BAU Resources

Overview of Impacted Groups and Level of Impact



Best Change Practices

Change Methodologies & Frameworks

Outline of Needed Ongoing Activities

- Ongoing communication about the change (as needed) to impacted employees and managers
- Following up with trainees and business unit managers to identify additional training needs or areas where help is needed
- Following up with managers to identify post-deployment issues
- Working with appropriate parties to resolve issues and roadblocks

Knowledge Transfer

Transition Schedule

Transfer of Assets, Documents & Tools

APPENDIX

Next Steps

Use this slide to plan out your next steps. Replace examples below with your own steps. Delete this note.

- List the next steps to take, for example:
  - Getting the change management team ready
  - Building the sponsorship model
  - Creating detailed change management plans