

OCM Solution Starter Toolkits for Projects

Your OCM Solution Toolkit Portfolio

With your All-in-One Change Management Platform, you get a portfolio of 10 paid tools and 5 free tools. These tools enable end-to-end change management for any type of project.

Paid Tools

1. Change Impacts
2. Risk Assessment
3. Readiness
4. Stakeholder Mgt
5. Communications
6. Training
7. Coaching
8. Adoption KPIs
9. Champions/Agents
10. Opposition Mgt

Free Tools

1. Change Management Project Plan
2. Change Management Strategic Playbook
3. Change Management Roadmap
4. Sponsor Management Plan
5. Project Management Plan

Your OCM Solution Toolkit Portfolio

It's great having all toolkit and template options you need for OCM in one place.

It's also necessary to support many types of projects.

However, we understand that having so many tools right at the start of a project can be overwhelming for some, especially those new to change management.

So, we've put together a recommended project "**Starter Kit**" of OCM Solution toolkits and templates.



What's a Project "Starter Kit?"

The 15 total tools available in your OCM Solution portfolio (paid and free) are designed to be used as needed to support any type or scope of project. While not every project may need every activity (e.g., coaching), some activities are a core aspect of OCM (e.g., impact assessment).

We recommend using a "core" set of 6 toolkits – a Project "Starter Kit" – when setting up every project for the first time.

These toolkits help you perform the key functions of change management.

Other toolkits can be added as you gain more experience in the platform and/or when you feel they are needed to support your change management activities. This approach helps keep change agents from being overwhelmed with too many toolkit and template options right away.

Project Starter Kit



Why a “Starter Kit?”

We have chosen these six tools for a few reasons:

- They represent the "core" tools necessary for successful change management.
- These tools give new and experienced change managers what they need to effectively conduct OCM support for a project.
- Nearly all projects (no matter the size) will require the activities these tools enable. They represent the key activities that new change practitioners need to know how to do.

Project Starter Kit



Why Start with These Tools?



Change Mgt. Plan

The free Change Management Project Plan tool provides you with a step-by-step checklist from project start to finish.

It answers the often-asked questions, “Where do I begin in learning about this project?” and “What do I do first?”



Risk Assessment

This toolkit provides you with the typical deliverables needed for the Project Management & Change Management sides of the project.

It helps you identify, address, and report on risks before they derail the project.



Change Impacts

A change impact assessment is required to determine the groups you must engage with.

This toolkit enables you to easily identify which groups are being impacted and how much they are being impacted. These are key things you need to know to plan OCM activities.



Readiness

The readiness assessment is your gauge for how prepared groups are to successfully adopt the changes, and the results drive your OCM activities.

This toolkit enables you to conduct as many readiness assessments as needed and allows you to chart readiness progress.



Communications

This toolkit gives you a place to plan out and track all your OCM communications (emails, newsletter postings, webinars, etc.).

Communications is a core function of change management engagement with impacted groups.



Stakeholder Mgt

Stakeholder assessment and management is vital for identifying and mitigating resistance.

This toolkit gives you a place to track key project stakeholders and their level of support for a project. As well as categorize stakeholders by level of influence on the project.

Use These 6 Tools for Your Project Starter Kit



When ready, you can add these other tools to your project as needed.

How Do I Start a New Project?

There are 2 ways to begin a new project:

1. Start a project from scratch
2. Duplicate an existing project

How to Start a New Project from Scratch

Start a New Project

Only Admin & Account Owner roles can create new projects.

From the Main Dashboard, scroll down to and click the “Start a New Project” button.

Start a New Project

1. Enter a project name

Name of My Project

Next

Name of My Project

How to Start a New Project



Start a New Project

2. Select **toolkits** to use for this project

Add all toolkits
Only toolkits that have available project licenses will be added

Add specific toolkits

Back

Next

The screenshot displays six toolkits selected for a project, each with a checkmark in the top right corner. Red arrows point from the 'Add specific toolkits' option to each of these toolkits.

- Change Impact Tool - Assess and Manage Impacts**: Includes a table for impact assessment.

Department	Role	Severity of Impact
HR	Standard	High
Sales	Sales Rep	Mid
Executive	Complex	Low
Shipping	Customer	High
- Change Readiness Tool - Track Organizational Readiness**: Shows overall score and readiness levels.

Overall Score	Mid Readiness
Awareness	High Awareness
Acceptance	High Acceptance
Capacity	Mid Capacity
Knowledge	Mid Knowledge
Training Needed	High Level of Training
- Stakeholder Tool - Assess & Manage Stakeholders**: Shows support levels for different stakeholder groups.

Low Support	Mid Support	High Support
5 icons	5 icons	5 icons
- Project Assessment Tool - Assess Need for Change Mgt**: Shows assessed project readiness and change readiness.

Assessed	Project Readiness	Change Readiness
Spokane	Low Risk	Low Risk
Communications	Very High Risk	Mid Risk
Collaboration	Mid Risk	High Risk
Go-Live Readiness	High Risk	Low Risk
Adoption	Very High Risk	Mid Risk
- Change Management Project Plan Template (Free)**: Shows workflow tasks.

Change Workflow Tasks	Count
Not Started	40
In-Progress	25
Behind Schedule	5
Completed	29
Canceled	3
- Communications Tool - Track & Manage Change Comms**: Shows communication types and their status/priority.

Communication Type	Status	Priority
Awareness	Sent	Mid Priority
Reminder	Approved	High Priority
Pre-Go-Live	Awaiting Approval	Low Priority
Post-Go-Live	Being Drafted	Mid Priority

Click “Add specific toolkits” and choose the six mentioned on [this slide](#). Then click “Next.”

How to Start a New Project

If you would like to add team members to the project, add them next. Note: Those with a “User” role will need to be added before they can access this project.

Start a New Project

3. Would you like to add **team members to this project?**

Yes

No

Back
Next



Project Owner

x OCM Onboarding (Accou...



Team Members

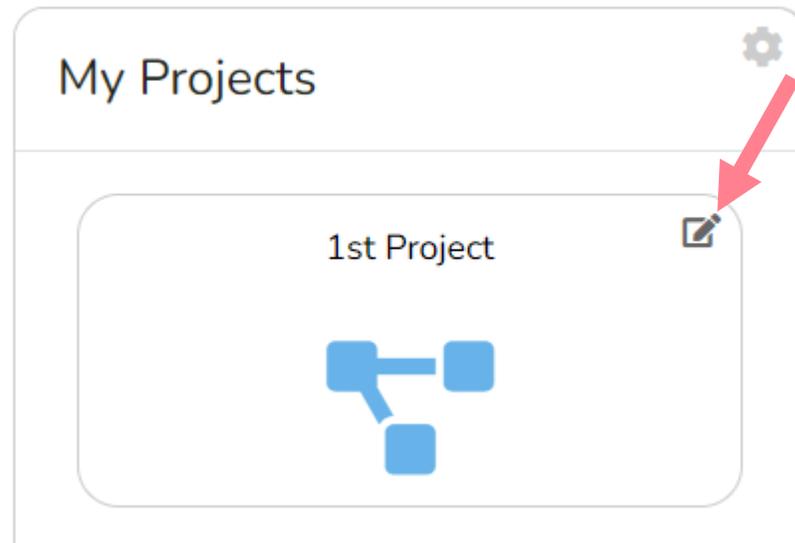
Follow the remaining prompts to create the project.

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How to Duplicate an Existing Project

Only Admin & Account Owner roles can duplicate projects.

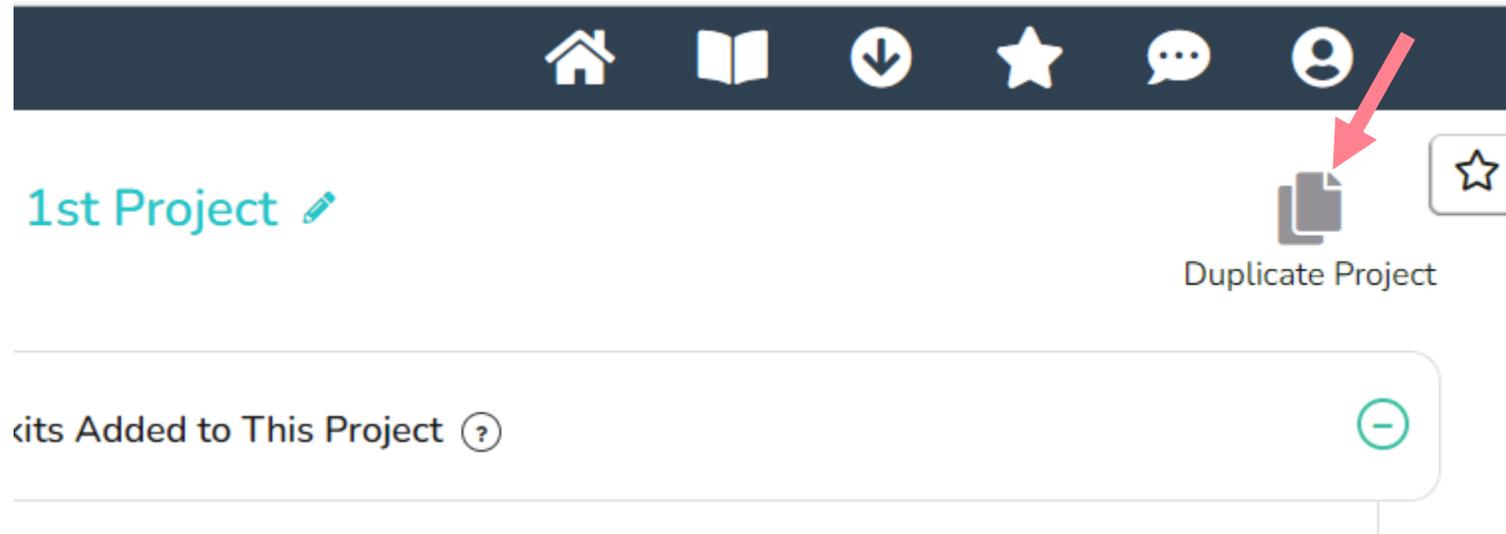
From the Main Dashboard, scroll down the My Projects Area.
Click the pencil icon next to the name of the project you want to clone.



How to Duplicate an Existing Project

At the top, right of the project home page, click the “Duplicate Project” icon.

Follow the rest of the prompts to name your project, add team members, etc.



Getting Started Resources for New Projects

How to Start a Project in the OCM Solution Platform:

Getting Started Checklist: <https://accounts.ocmsolution.com/media/editor/OCM-Solution-Getting-Started-Checklist.pdf>

How to Start with a Project in Your Organization (What Do I Do First?):

Project Assessment Checklist: You'll find it in the Project Assessment Toolkit. From the Main Dashboard, click open "1. Assess", scroll to "1.2 Assess Project Risk & Successes" and click to go to your Existing Project. Then, click "Use Tasks Checklist" and click the checklist icon.

1

My Workflow

1. Assess
Conduct Change Assessments

1.2 Assess Project Risk & Successes

Assessed	Project Readiness	Change Readiness
Governance	Low Risk	Low Risk
Communications	Very High Risk	Mid Risk
Collaboration	Mid Risk	High Risk
Deliver Readiness	High Risk	Low Risk
Adoption	Very High Risk	Mid Risk

Toolkit to Use
Project Assessment Tool - Assess Need for Change Mgt

[Existing Project](#)

[New Project](#)

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Where Should We Go Next?

1. Select an action

- Input Data
- View Reports
- Use Tasks Checklist
- Questionnaires & Surveys
- Other Actions

Click your checklist below

Project Assessment, Risks, and Success Tracking Checklist

Questions?

Contact us at:

OCMSolution.com/contact-us

