OCM SOLUTION

**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.

Free Change Plan

Change Impacts

Risk Assessment

Readiness

Communications

Stakeholder Mgt

All-in-One Change Management Solution
(with Overall Metrics Dashboard)

Training

Coaching

Adoption KPIs

Champions/Agents

Opposition Mgt

Other Free Tools
Playbook Roadmap
Sponsor Mgt Project Mgt

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 <u>every project</u> 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

- Free Change Plan
- Risk Assessment
- Change Impacts
- Readiness
- Communications
- Stakeholder Mgt

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

Free Change Plan

Risk Assessment

Change Impacts

Readiness

Communications

Stakeholder Mgt

Why Start with These Tools?

Free Change Plan

Risk Assessment

Change Impacts

Readiness

Communications

Stakeholder Mgt

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 identity 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

Free Change Plan

Change Impacts

Risk Assessment

Readiness

Communications

Stakeholder Mgt

All-in-One Change Management Solution
(with Overall Metrics Dashboard)

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

Training

Coaching

Adoption KPIs

Champions/Agents

Opposition Mgt

Other Free Tools

Playbook
Roadmap

Sponsor Mgt
Project Mgt

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

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

Start a New Project ✕

Name of My Project

1. Enter a project name

Name of My Project

Next

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

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

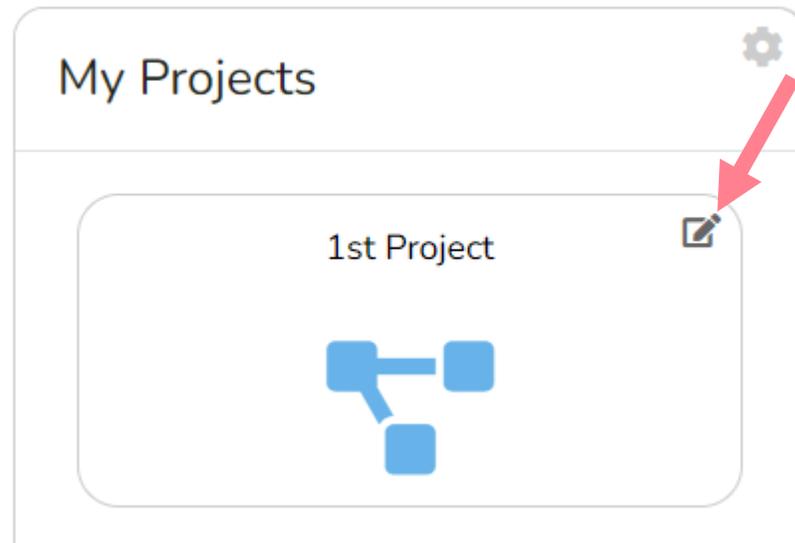○ No

Project Owner

× OCM Onboarding (Accou...

Team Members

Back

Next

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.
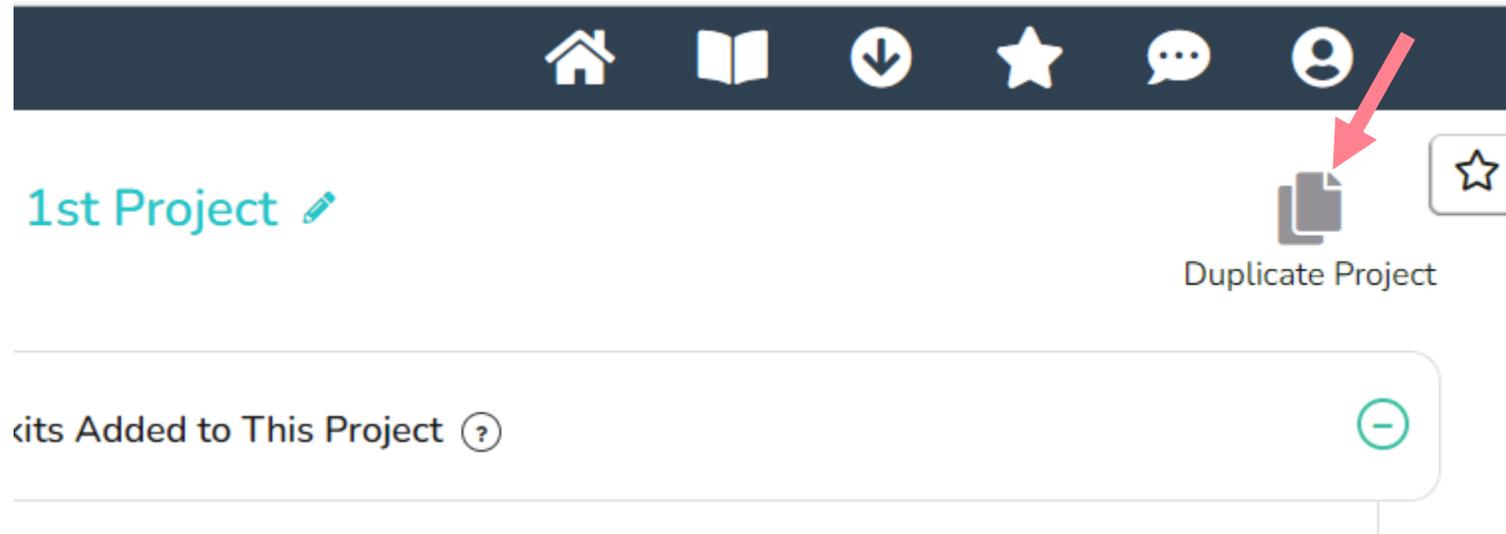
Getting Started Resources for New Projects

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.

Questions?

Contact us at:
OCMSolution.com/contact-us

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