

Key Insights

Level of Project Risk / OCM Effort Needed

Mid Risk/Effort

The project risk / OCM effort score is calculated based on the following metrics.

When a project has a mid-level change management risk, it suggests that there are moderate challenges and uncertainties associated with implementing the proposed changes within the organization.

While there might be some stakeholder support and communication efforts in place, there could be pockets of resistance, pending tasks, and areas where further improvements are needed.

The change team might need to invest additional efforts in addressing concerns, providing more comprehensive change management, and fine-tuning the change strategies to ensure a smoother transition and successful adoption of the changes.

Organizational
Impacts

67%

of the overall organization is impacted by this project

of Changes

4

This is the number of changes being implemented by this project.

Customer
Impacts

Very Low to Low

This project impact customers Very Low to Low.

Level of Impact

Most are High

Most changes have a high level of impact

Average
Stakeholder
Risk

Mid

This is the average risk level across all targeted stakeholders.

Average
Readiness
Level

High

This is the average readiness level across all impacted groups.

Level of Training
Needed

Mid

This is the average level of training needed to enable change adoption.

Project Overview

Project Goals

The current system of task management is manual, inconsistent, and can't be accessed online. The goals include increasing efficiency, improving productivity and improving online collaboration.

Summary of What is Changing

The Departments will no longer use their current task manual management systems. They will adopt the company's cloud-based task management software and follow an updated task management policy for creating and tracking all employee tasks.

Project Success Team

Project Manager	Change Manager	Project Sponsor
Jim Doe	Julie Doe	Kaitlin Dimitriou
		Maximilien Babbe
		Yorker Donisthorpe

Project Timeline

Start Date: **10-31-2023**

Go-live date: **01-10-2024**

End date: **02-28-2024**

Overall Project Scope (Executive Summary)

The changes required by this project will impact approximately **67%** of the organization. As this project's scope of impact on the organization is mid-to-large, there may be a lot of complexity and challenges to the change implementation

To address these challenges, the change team will develop and implement a comprehensive and inclusive change management plan which will consist of regular, transparent communication detailing the nature of the change, its implications, and the advantages it brings, to all the impacted parties.

The change team will coordinate with key stakeholders to develop and implement a tailored training and learning opportunities to facilitate employees in acquiring the new skills necessitated by the change.

The team will actively seek feedback and address any concerns or resistance promptly and effectively. Identifying and empowering change champion and advocates across the groups will help encourage a positive attitude towards the change.

Regular monitoring and adjustment of the change management strategy in response to feedback and the shifting organizational requirements will be implemented to help ensure a smoother transition and higher adoption rates.

Target Audience Engagement Plan

Targeted Organizations

Name of Organization	Groups within Organization
Department	10 Groups
eTeam	3 Groups
Group 3	1 Group
Group Level 4	3 Groups

Targeted Locations

Location Type	Groups within Location
City	9 Locations
Site	No Location
Location Level 3	No Location

Targeted Individuals

Total Individuals
[251 individuals](#)
This is the # of individuals impacted by this change

Stakeholder Types

- Key Stakeholder: [4 individuals](#)
- Sponsor: [1 individual](#)

Next Steps

The next steps for the change team will involve the following:

- 1. Impact Analysis:** Conduct a detailed impact analysis to understand the specific changes that will affect the identified target audience. This analysis will help identify the scope and magnitude of the changes and how they will influence different individuals or groups within the organization.
- 2. Stakeholder Engagement and Communication:** Engage with the identified target audience and key stakeholders to communicate the upcoming changes. This will involve explaining the reasons for the changes, the expected benefits, and addressing any concerns or questions they may have. The communication will be tailored to address the needs and preferences of different groups within the audience.
- 3. Change Readiness Assessment:** Assess the readiness of the target audience to accept and embrace the changes. This will involve understanding their current level of knowledge, skills, and attitudes related to the upcoming changes. The insights gained from this assessment can be used to design targeted training and support programs.
- 4. Change Champions and Sponsors:** Identify change champions within the target audience who can advocate for the changes and help influence their peers. Additionally, the change team will ensure that there are sponsors and leaders supporting the changes, as their endorsement is crucial for driving successful change adoption.
- 5. Training and Development:** Develop and deliver learning programs tailored to the needs of the target audience. The learning will aim to equip individuals with the necessary knowledge and skills to adapt to the changes effectively.
- 6. Change Support Materials:** Prepare and provide support materials, such as guides, FAQs, and job aids, to assist the target audience during the transition. These resources will serve as quick references and help reinforce the learning from the training.
- 7. Feedback Mechanism:** Establish a feedback mechanism to gather input from the target audience. This allows them to express their concerns, suggestions, and challenges, helping the change management team to address issues promptly and make necessary adjustments to the change implementation process.

- Champion: [3 individuals](#)
- Manager: [2 individuals](#)
- No stakeholder type assigned: [243 individuals](#)

8. Pilot or Phase Approach: The change team will consider implementing the changes in phases or conducting a pilot program in a smaller area before rolling out the changes across the entire organization. This approach allows for testing and refining the change management strategies based on real-world feedback.

9. Monitor and Evaluate: The change team will continuously monitor the progress of the change management efforts and evaluate the impact on the target audience. The team will use key performance indicators (KPIs) to measure success and identify areas that require further attention and improvement.

10. Adjust and Iterate: Based on the feedback and evaluation results, the team will make necessary adjustments to the change management plan and strategies. Change is often iterative, and continuous improvement is vital to ensure successful change adoption.

By following these immediate next steps, the change management team aims to increase the chances of successfully implementing the business change and achieving the desired outcomes.

Change Impacts Summary & Recommended Change Actions

Here are the top five groups that should be prioritized based on the severity of all the changes impacting them. See the Target Audience section above for more details on the full list of targeted organizations and groups that are being impacted by this project. See the sections below for steps to take to engage with these top impacted groups and increase adoption of the changes.

Top 5 Impacted Groups



Next Steps



Implement Targeted Approach: The change team's strategy for engaging with these top impacted groups will involve a targeted and detailed change management approach. This approach will involve direct, transparent communication with the leadership and employees of these organizations, explaining the purpose, process, and benefits of the change.



Collaboration: The OCM team will work to maintain close collaboration with the leadership of these top impacted organizations, as their endorsement and active participation can significantly influence the perception and acceptance of the change among their teams.



Champions & Feedback Loop: The change team will identify and partner with change champions within these organizations to help drive change acceptance and foster a supportive change culture. Incorporating a 2-way feedback mechanism will be implemented to ensure early detection and mitigation of resistance or concerns.



Knowledge: The OCM team will develop tailored learning and support systems to address specific needs and challenges of these organizations, helping their members to acquire new skills required due to the change. Employee engagement activities, such as workshops, town halls, or Q&A sessions, will be considered as these are valuable forums for fostering open dialogue and facilitating a smoother transition.



Rewards & Recognition: While training equips employees with new skills, it's equally important to provide emotional support during the transition to address fears or anxieties. Recognizing and rewarding early adopters can serve as a positive reinforcement for change adoption.



Iterative Approach: Ongoing monitoring and adjusting of the change management plan based on real-time feedback and shifting requirements will also be crucial for the success of the project. In essence, the change team's empathetic, inclusive, and iterative approach will be key in managing the impact of the change project on these organizations, ensuring not just the implementation of the change but the sustainability of its outcomes.

Very Low to Low

Impact Level



Communications

- Even with very low to low customer impact, it's essential for the change team to not underestimate the importance of clear communication and preparation. As such, the team will ensure customers are informed about the upcoming changes, highlighting the reasons behind them and assuring customers of minimum disruptions.
- The change team will engage with key internal stakeholders to determine customer contacts that should be engaged and will prepare awareness communications to be shared with these customer contacts, including identifying which internal stakeholders are best suited to deliver these communications.
- The customer communication strategy will involve providing ample notice before any changes take effect. This allows customers to prepare and adjust to the changes without feeling caught off guard.
- The team will craft clear and straightforward messaging to communicate with customers and will avoid technical jargon and focus on explaining the changes in terms that customers can easily understand.

FAQs & Resources

- The change team will provide easy-to-access such as FAQs or helplines, to provide customers with a resource to turn to for questions or issues..
- The change team will prepare a list of FAQs addressing potential customer queries about the changes and make these FAQs easily accessible on the company's website or through customer service channels.

Training (If Applicable)

- As needed, the change team will work with internal stakeholders to develop and provide training materials or resources to help customers adapt to the new solution.
- Employees who interact with customers will be adequately informed about the project and its potential impacts. This way, they can confidently address any questions or concerns from customers.

By proactively communicating with customers and addressing their needs during the project's implementation, the change team will ensure a smooth transition with minimal disruption to customer interactions.

Severity of Changes (Low, Mid or High Impacts)

Most Impacts are High

Most changes have a high-level of severity (high impacts). A well-structured, and targeted change management approach will be implemented to minimize risks and ensure successful implementation. High severity impacts increase the potential for change resistance, and the change team will implement the following steps to mitigate opposition and increase user buy-in

Here are the next steps for the change team:

- 1 Prioritization**
Prioritize the groups that are experiencing the highest levels of impacts and engage with them early on in the process to reduce resistance and increase buy-in and partnership.
- 2 Stakeholder Engagement and Communication**
Engage with employees, managers, and key stakeholders to communicate the changes. Provide clear and frequent updates to keep everyone informed about the project's goals, timeline, and potential implications on their roles and responsibilities.
- 3 Change Champions and Leadership Support**
Identify change champions among employees and managers who can act as advocates for the changes within their respective teams. Secure strong leadership support to reinforce the importance of the project and foster commitment.
- 4 Training and Development Programs**
Develop comprehensive training programs tailored to the needs of employees and managers. Ensure that they are equipped with the necessary skills and knowledge to adapt to the changes effectively.
- 5 Change Readiness Workshops**
Conduct change readiness workshops to help employees and managers understand the need for change, address any resistance, and build a positive mindset towards the project.
- 6 Coaching and Support**
Provide individual coaching and support to managers who are expected to lead their teams through the changes. Help them develop the necessary leadership skills to manage their teams during the transition.
- 7 Employee Feedback and Involvement**
Create opportunities for employees and managers to provide feedback and be involved in the decision-making process, when appropriate. This fosters a sense of ownership and reduces resistance.

- 8 Change Management Metrics**
Establish metrics to measure the success of the change management efforts. Monitor and analyze the data to identify areas that require further attention and improvement.
 - 9 Anticipate and Address Resistance**
Proactively identify potential sources of resistance among employees and managers and develop strategies to address them. Involve change champions and leaders to address concerns and provide support.
 - 10 Clear Communication Channels**
Ensure that there are clear communication channels for employees and managers to ask questions, express concerns, and seek support during the change process.
 - 11 Evaluate and Learn**
Conduct a post-project evaluation to identify any lessons learned or areas for improvement in the change management approach.
 - 12 Recognition and Celebration**
Acknowledge and celebrate milestones and successes achieved during the project. Recognizing the efforts of employees and managers boosts morale and motivation.
 - 13 Continuous Improvement**
Continuously assess the change management process and adjust strategies as needed based on feedback and evaluation. Change is iterative, and ongoing improvement is essential for successful implementation.
In a project with high impacts on employees and managers, effective change management is vital to maintain productivity, employee morale, and overall organizational performance. By following these next steps, the change team can support the organization in navigating the changes successfully and achieving the desired outcomes.
-

The number of changes being implemented by this project:

4

Groups are being impacted by 4 total changes. Irrespective of the total number of changes, the change team will ensure it follows best change management practices. To increase impacted user adoption and receptiveness to the changes, the change management team will follow the essential steps outlined below.

Robust Communication

The change team will implement clear and transparent communication to inform users about the transformation, its objectives, and the anticipated benefits.

- **Adequate Runway:** The team will begin implementing the communication process as early as possible to provide users with ample time to prepare for the change. Early communication helps build awareness and reduces uncertainty.
- **Clear and Transparent Messaging:** The team will use clear, jargon-free language to explain the change, its purpose, and expected outcomes. And will be transparent about the reasons for the change and how it aligns with the organization's goals.
- **Address the "Why":** The team will focus on the "why" behind the change. The team will explain the drivers and the benefits it will bring to the organization, teams, and individual users. Highlight how the change aligns with the organization's vision.
- **Tailor Messages:** The change team will customize the messaging to different user groups based on their needs, and will address specific challenges and benefits that each group will experience due to the change.
- **Multiple Communication Channels:** The team will utilize a variety of communication channels to reach all impacted users effectively. This may include emails, town hall meetings, webinars, videos, intranet announcements, posters, and one-on-one conversations.
- **Two-Way Communication:** This will involve encouraging feedback and questions from users. The team will create channels where users can voice their concerns, and be prepared to address them promptly and transparently.
- **Engage Leaders and Change Champions:** The change team will involve leaders and change champions in the communication process. Their support and endorsement lend credibility to the message and inspire confidence in the change.
- **Use Visuals and Storytelling:** The team will incorporate visuals, infographics, and storytelling to make the message more engaging and memorable. Visuals can simplify complex information and aid in understanding.

Stakeholder Engagement and Involvement

The team will engage with key stakeholders and user groups early in the process. Involve them in decision-making, gather their input, and address their concerns to foster a sense of ownership and commitment to the changes.

Change Champions

The team will identify and empower change champions among impacted users. These individuals can play a crucial role in advocating for the changes, leading by example, and encouraging their peers to embrace the transformation.

FAQs, Training and Support

The team will provide FAQs, learnings and when needed will provide customized training programs to equip users with the necessary skills and knowledge to adapt to the changes. The team will offer ongoing support during the transition to ensure a smooth adoption process.

Pilot and Feedback Mechanism

The team will implement the changes in pilot groups or smaller segments of the organization first, and will gather feedback from pilot users and incorporate their insights to refine the transformation approach.

Continuous Communication

The team will maintain open and transparent communication channels throughout the entire transformation process. Regularly update users on progress, milestones, and any adjustments to the plan.

Addressing Resistance

The team will anticipate potential resistance from users and proactively address their concerns, and provide a platform for users to voice their opinions and work collaboratively to find solutions.

Leadership Support

The team will secure strong leadership support and commitment to the transformation. Visible support from top-level executives reinforces the importance of the changes and sets a positive tone for the entire organization.

Celebrate Successes

The team will recognize and celebrate milestones and successes achieved during the transformation. Positive reinforcement boosts morale and reinforces the value of the changes.

Change Readiness Assessment

The team will conduct a change readiness assessment to gauge the level of readiness and receptiveness among users and will tailor change management strategies based on the assessment results.

Post-Implementation Support

The team will provide ongoing support and assistance after the transformation is implemented, and address user inquiries and challenges promptly to ensure a successful transition.

By following these steps, the change management team will effectively prepare impacted users for a business transformation involving multiple changes. Increasing user adoption and receptiveness to the changes will foster a positive and productive organizational culture, supporting the success of the overall transformation effort.

Stakeholder Engagement

Stakeholder Risk Scores

The stakeholder assessment shows the following Stakeholder Risk for this project:



Stakeholder risk score is determined based on these metrics

1. Level of receptiveness (lower receptiveness = higher risk score)
2. Level of influence (higher influence = higher risk score)
3. Level of availability/capacity (lower availability = higher risk score)

Next Steps

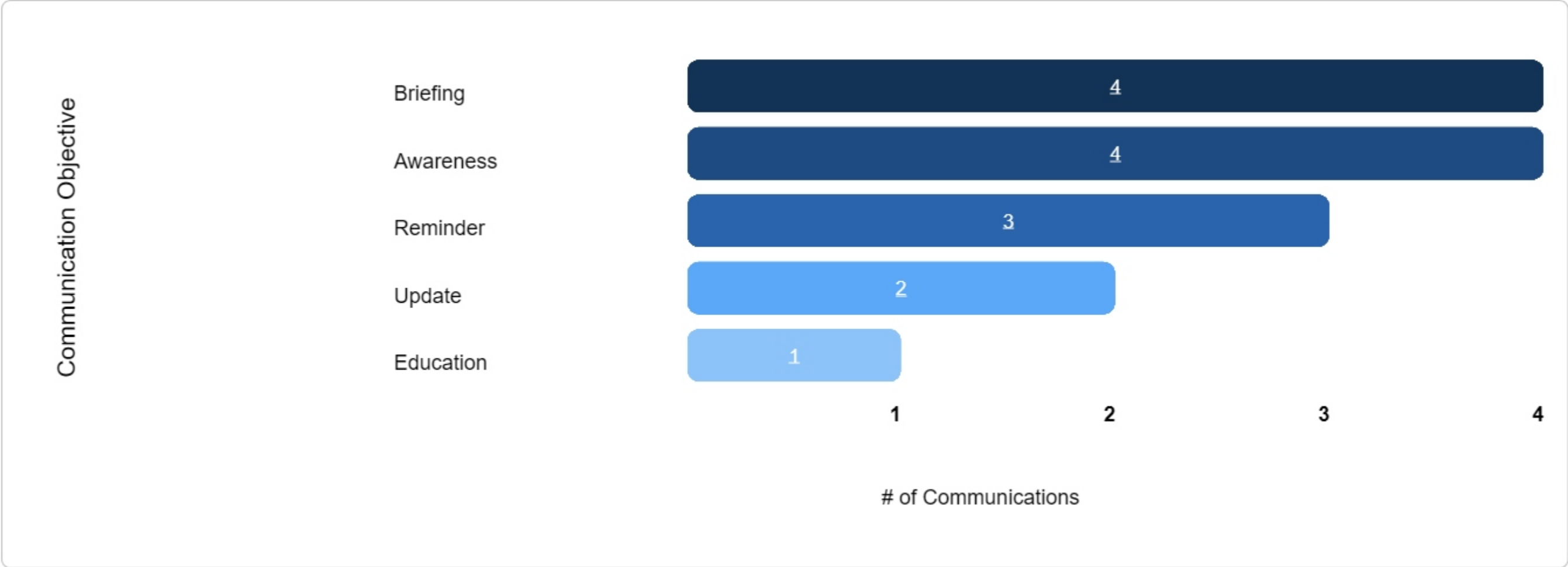
The next steps for the change team for stakeholder engagement and management will involve the following:

- **Prioritize stakeholder engagement according to risk score:** Stakeholders with higher risk scores will require more engagement. Those with lower risk scores can be assets. For example, the change team will ask them to help with resistant colleagues.
- **Drill down into the reasons for high-risk scores:** Do they have low receptiveness? Do they hold a high amount of influence in the organization or for this project? Do they have challenges with availability?
- **Apply individual stakeholder engagement plans:** Provided in the team's [Stakeholder Tool](#) to guide the engagement with each individual.
- **Plan both individualized engagement:** This approach will be specific to each stakeholder, for example speaking with them about their reasons for low receptiveness, and shared engagement (e.g., communications that go out to everyone)
- **Engagement:** The change team will engage these stakeholders and prepare them for the change. The final step will involve continual engagement and management of these stakeholders throughout the project.

Communications

Communications Summary

There are currently 14 communications scheduled for this project, which includes the following communication objectives.



Communication Calender - Upcoming Communications

Delivery Date	Communication Name	Audience	Objective	Type	Sender
April 25, 2024	Scheduling Reminder	All	Reminder	Email	Simon Champion
April 29, 2024	Champions Meeting	Champion	Briefing	Meeting	Francesca Tutorial
May 16, 2024	Go-Live Date Reminder	All	Reminder	Email	Francesca Tutorial
May 22, 2024	Champions Meeting	Champion	Briefing	Meeting	Francesca Tutorial
May 26, 2024	Post-Go-Live Support Awareness	All	Awareness	Email	Simon Champion
May 31, 2024	Customer Change Notification	Fort Wayne, Detroit	Awareness	Email	Francesca Tutorial
June 27, 2024	Champions Meeting	Champion	Briefing	Meeting	Francesca Tutorial

Up to 20 are showing above

Next Communications Steps for the OCM Team

- 1 Determine communication needs (what we need to communicate and why).
- 2 Determine groups that need to receive each communication.
- 3 Enter communications in the change team's [Communications Tool](#), including date, objective, channel, "send to" audience, type (email, meeting, social post, etc.), and senders.

4

Draft & format the communication messages (incorporate unique communication requirements per group).

1. Craft a Clear and Compelling Message: Concise and straightforward messaging that explains the reason for the change, the benefits it will bring, and the potential impacts on individuals and the organization as a whole. The message will be easy to understand to ensure it resonates with employees at all levels.
2. Be Transparent and Honest: Foster an atmosphere of transparency and honesty in all communications. Acknowledge any uncertainties or potential challenges and provide realistic timelines and expectations.
3. Address Concerns and Questions: Set up channels for employees to ask questions and provide feedback. Be responsive to concerns and address them promptly and openly.
4. Share Success Stories: If possible, the change team will share success stories from other teams or organizations that have undergone similar changes. Positive examples can help alleviate anxiety and demonstrate the benefits of the change.
5. Use Visual Aids and Storytelling: The team will aim to use visuals, infographics, and storytelling techniques to make the communication more engaging and memorable.
6. Reinforce the Vision: The change team will continuously reiterate the vision and goals of the change throughout the communication process, and remind employees of the desired future state and how their efforts contribute to the organization's success.

5

Determine and add effectiveness metrics (if applicable). The team will keep track of the effectiveness of the communication efforts using KPIs and metrics, and will be prepared to adjust the communication plan based on feedback and evolving needs.

Potential KPI and metrics ideas will include tracking:

1. Employee awareness of the communication message
2. Employee desire to support what is being communicated
3. Outcome (E.g., Are employees doing what we've asked them to do in the communication?)
4. Email metrics (engagement rate, open rate, click-through rate)

6

Execute and measure communication effectiveness.

7

Celebrate Milestones: The team will recognize and celebrate achievements and milestones reached during the change process. This helps build morale and reinforces the positive aspects of the change.

Training



Training Courses
2



Trainees
76

Training Programs & Level of Training Needed



Next steps for the change team:

1. Set Training Objectives

Based on the training needs identified, establish clear, measurable objectives for the training. Including the skills and knowledge the participants should gain and how these will contribute to the success of the project.

2. Share Training Plan

Socialize detailed training plan with key stakeholders and integrate feedback. Training plan will outline what will be taught, how it will be delivered, and when the training will occur.

3. Develop Training Materials

This will include presentation slides, handouts, manuals, online learning modules, or other materials based on how users want to be trained. The materials developed will be engaging, relevant to the project, and designed to meet the training objectives.

4. Deliver the Training

The training will be implemented according to the plan and may involve in-person sessions, online learning, on-the-job training, or a combination. The change team will provide opportunities for practice, feedback, and interaction.

5. Evaluate the Training

After the training has been delivered, the change team will evaluate its effectiveness including testing participants' knowledge, observing their performance, or asking for their feedback. The team will use this information to adjust future training as needed.

6. Monitor Progress and Provide Ongoing Support

After the initial training, the team will continue to monitor participants' progress towards the project goals and provide ongoing support and additional training as needed. This will help to reinforce the training and ensure its long-term effectiveness.

7. Document Lessons Learned

At the end of the project, the team will conduct a review to identify what worked well and what could be improved in future training initiatives, and will document these lessons learned to help inform future projects.

These steps will help to ensure that the training is effective, that it meets the needs of the project and the participants, and that it contributes to the overall success of the project.

Project Closeout & Exit



At the end of the project, the change management team will implement its transition plan. Part of this transition will involve a transfer of responsibilities from the change management team to the designated group(s) determined by the project leads.

Steps the OCM Team will take to close out and exit the project include:

- 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 are being developed
 - Determine what outstanding issues need to be addressed
 - Work out an acceptable timetable for the transition to occur
- Close out any functions, agreements, or tools that were only needed during the duration of the project.
- Perform a knowledge off-loading and responsibility hand-off.
- Ensure the groups taking permanent responsibility for the changed process have access to any documents, “best practices,” online tools, etc. that may stay in use for the new process/procedure, as well as any other assets they need to properly take over responsibility for the changed process or system.
- Complete and distribute the final project report, inclusive of all final OCM success metrics, details on project successes and areas with room for improvement, and final recommendations.