Agenda

- Introduction and Overview
- Organizational Change Management Framework – How?
  - Overarching Activities
- Organizational Change Management Framework – Proven Methodologies and Tools
  - Leverage Your Resources and Make them Your Own
  - Document and Follow OR Guiding Principles
  - Communication Plan & Training Strategy
  - Define and Articulate "What's In It For Me?"
  - Organize OR Artifacts
- Q&A

Jacob Cancelliere

Strategic Advisor and Account Manage,
Rego Consulting

Jacob Cancelliere has more than 17 years of experience in PPM system implementations and has helped dozens of PMOs design and implement sustainable solutions. Jacob specializes in overall solution planning, architecture and ensuring your PPM system is working within a balanced ecosystem of tools and processes.

Erich Kissel

Sr. Solutions Architect,
Rego Consulting

Project Portfolio Management (PPM) thought-leader and systems architect / group manager who has delivered solutions that put people at the center of process ecosystems via adoption-centric design, and proven value delivery methodologies.

This has included the enablement of executive success through customer-facing consulting and internal IT leadership roles, mainly focused on SaaS PPM, Agile (SAFe), ITIL, and Organizational Change Management (OCM) outcomes-based initiatives.

Additionally, a contributing author of the book *Realize PPM* (2020), an active blogger, professional Twitter account manager and has presented / actively participate in many industry events, including Global PMI, Gartner Summit and Magic Quadrant white papers, etc.

"PPM is a Human Story"

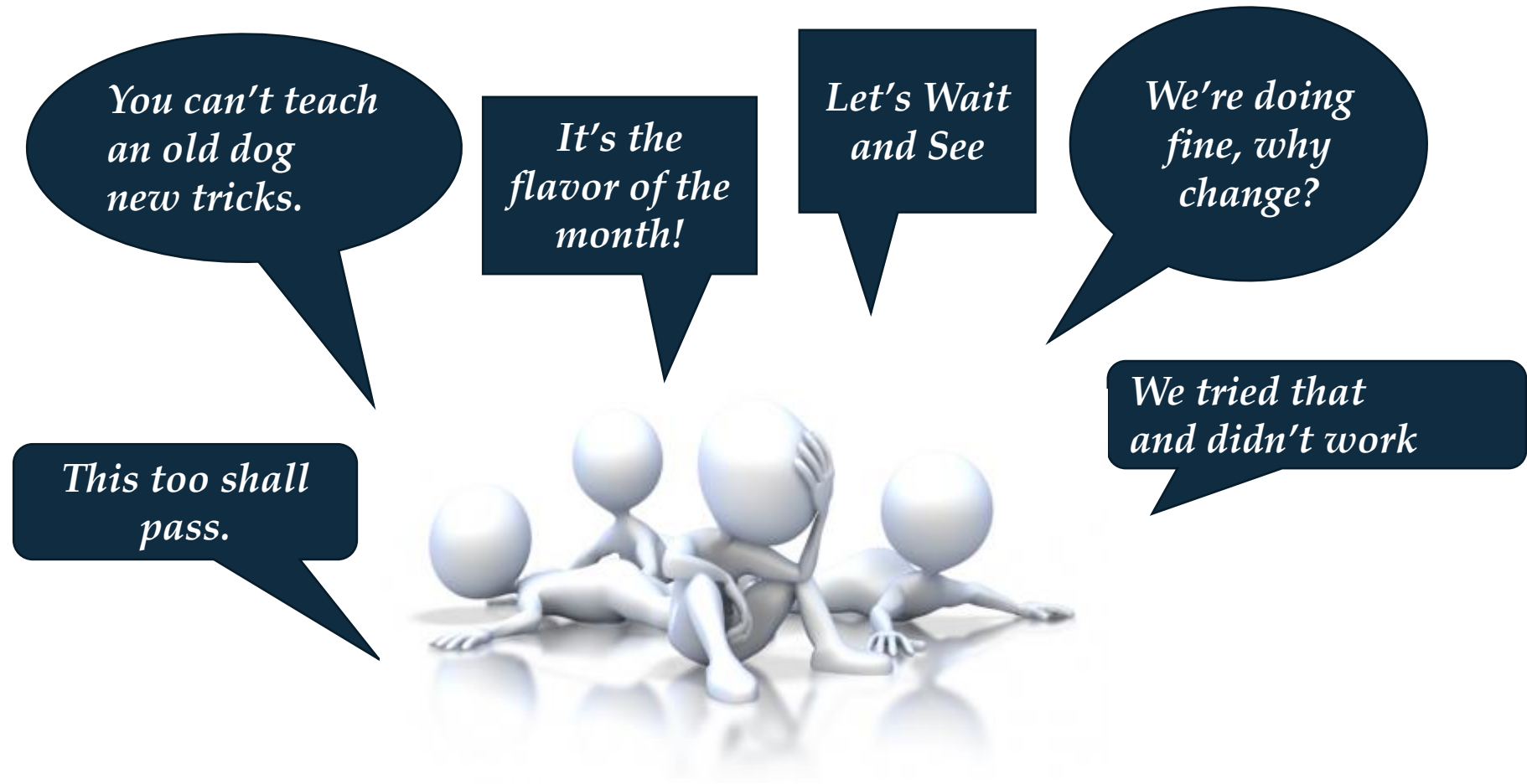70% - 80% of change initiatives fail to achieve their desired results

Why?

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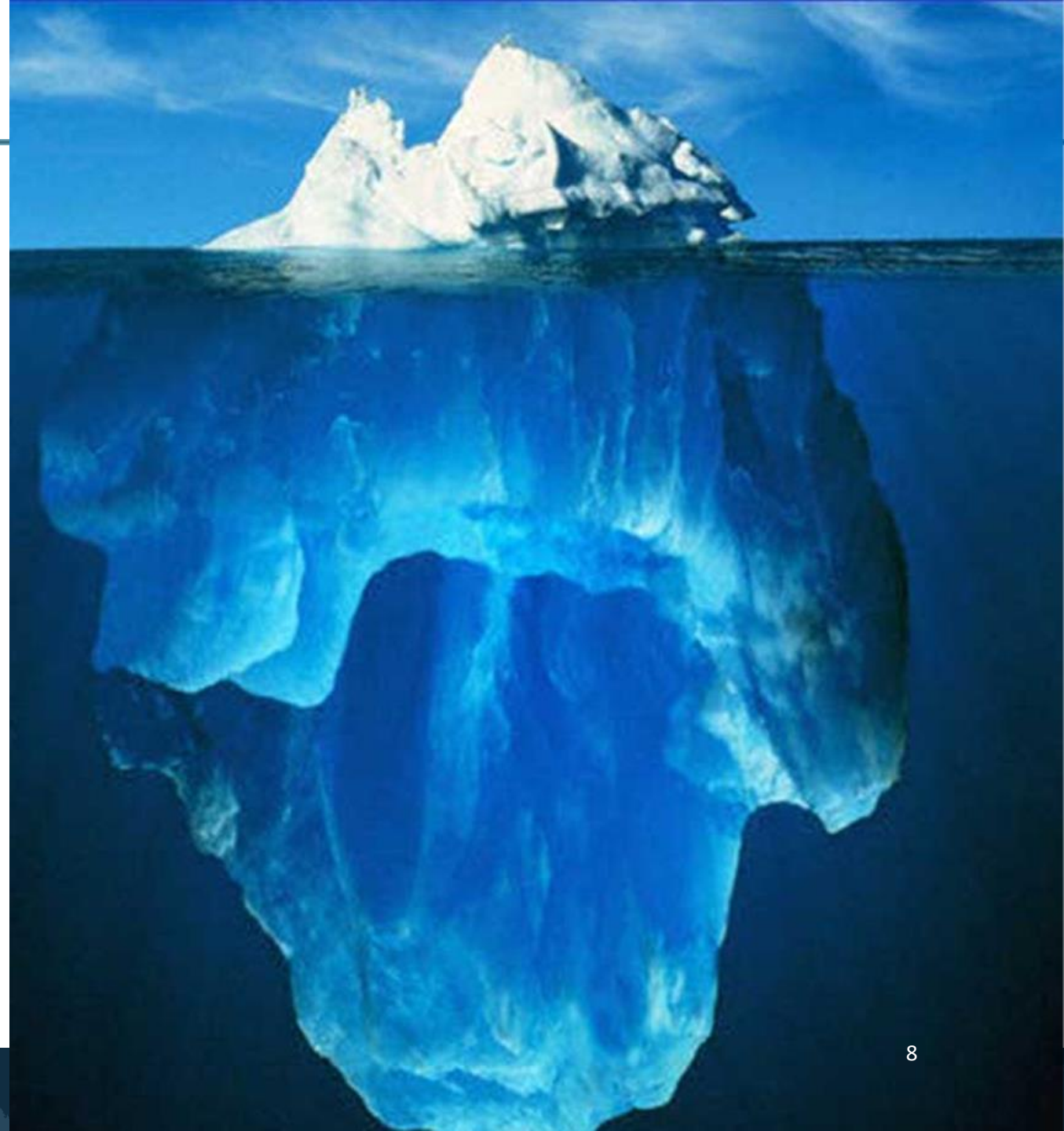
Faces of Resistance

What's Really Happening?

- Low Trust
- Lack of understanding and belief
- Misaligned values and objectives
- Perceived lack of ability
- Lack of focusing on results

Why Change Management?

To enable individuals to adopt new values, skills, and behaviors so that business results can be achieved for the organization as a whole.

It is fundamentally about people.

If people don't change how they do their job,
then it doesn't matter what specific changes are implemented.

If people don't change how they do their job,
then we ultimately won't achieve what we
set out to do from the beginning.

Source: Change Management, Jeffrey Hiatt and Timothy Creasey

How You Change Is Just As Important As What You Change - Change is Inevitable
Success is Optional

Our Experience

"I want you to find a bold and innovative way to do everything exactly the same way it's been done for 25 years."

Organizational Change Management Framework – How?

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This is all great – but....

What if you don't have a dedicated Change Manager or full Sponsor support?

What Change activities can you complete to be successful?

1. **Provide crystal-clear communication**
2. **Consider your culture**
3. **Pace yourself**
4. **Create accountability**
5. **Measure your success**

Consider Your Culture

Culture is like the wind. It is invisible, yet its effect can be seen and felt.

When it is blowing in your direction, it makes for smooth sailing. When it is blowing against you, everything is more difficult.
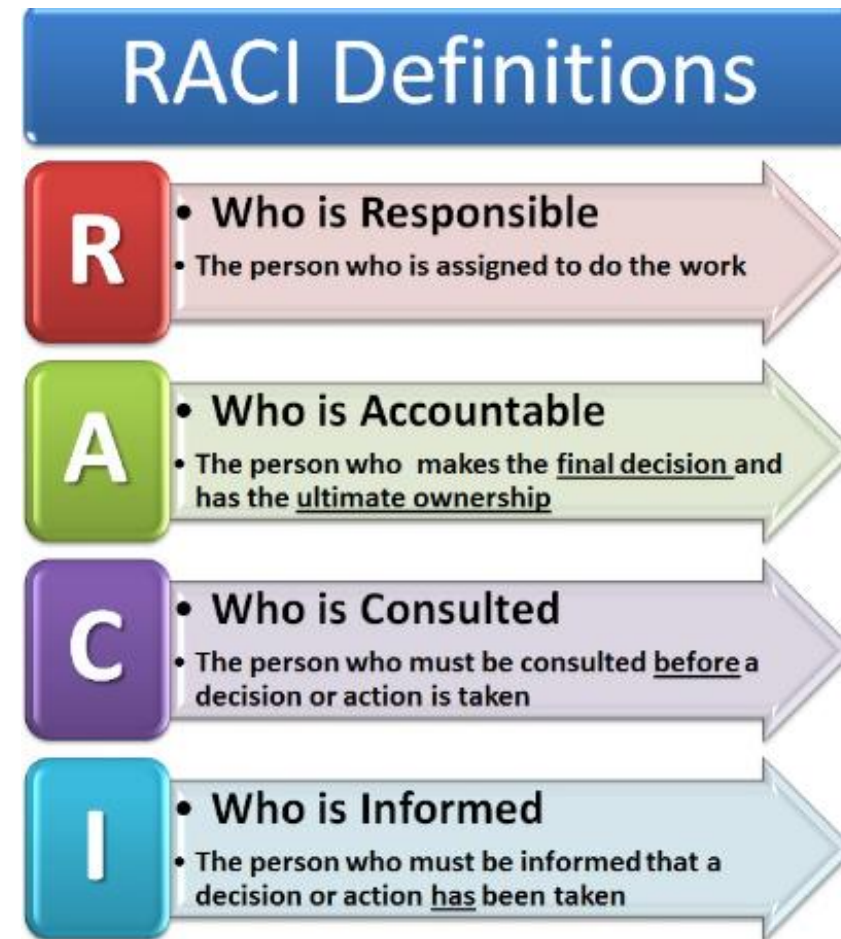
Pace Yourself

Remember, keeping pace with employees and meeting them where they are will allow you to lead your change effectively and keep the doors of communication open throughout your change effort.

Create Accountability

Giving your employees a well-defined set of responsibilities can empower and engage them because they feel they have a hand in the organization's plans for change.

RACI Definitions

R • Who is Responsible
• The person who is assigned to do the work

A • Who is Accountable
• The person who makes the final decision and has the ultimate ownership

C • Who is Consulted
• The person who must be consulted before a decision or action is taken

I • Who is Informed
• The person who must be informed that a decision or action has been taken

Measure Your Success

1 – Adoption Metrics

2 – Qualitative/feedback metrics

3 – Employee Performance

4 – Overall Project Performance

5 – Readiness Assessment

Collect the employee feedback and compliance information

Analyze the data; look for patterns and themes
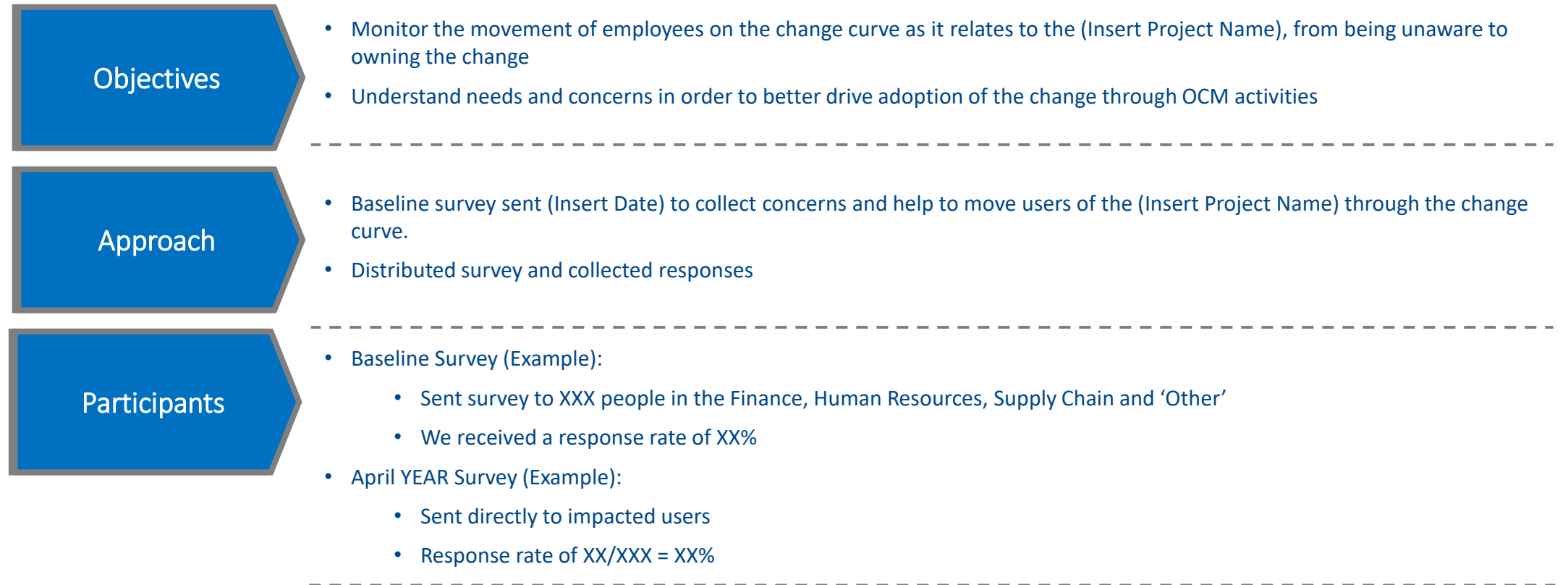
Prepare summaries of key findings

Organize findings so that they can be quickly and easily understood

Evaluate the overall effectiveness of the change management program and identify any weaknesses

Change Readiness

A change readiness assessment will provide the information necessary to drive adoption in the organization.
Its recommended the survey is sent at the start, middle, and end of the project. The results will provide metrics to show you how well your teams adopt and move through the change curve

Objectives

- Monitor the movement of employees on the change curve as it relates to the (Insert Project Name), from being unaware to owning the change
- Understand needs and concerns in order to better drive adoption of the change through OCM activities

Approach

- Baseline survey sent (Insert Date) to collect concerns and help to move users of the (Insert Project Name) through the change curve.
- Distributed survey and collected responses

Participants

- Baseline Survey (Example):
  - Sent survey to XXX people in the Finance, Human Resources, Supply Chain and 'Other'
  - We received a response rate of XX%
- April YEAR Survey (Example):
  - Sent directly to impacted users
  - Response rate of XX/XXX = XX%

Failure to adopt is expensive and undesirable –

which leads to

an equally impactful leadership response.

By leveraging a thoughtful approach, we can

build an adoption solution *for* PPM

– not just '…*and* PPM' –

that is **baked into the ecosystem**.

This, by comparison, is inexpensive –

and as the industry is proving

it is imperative to **value delivery**.

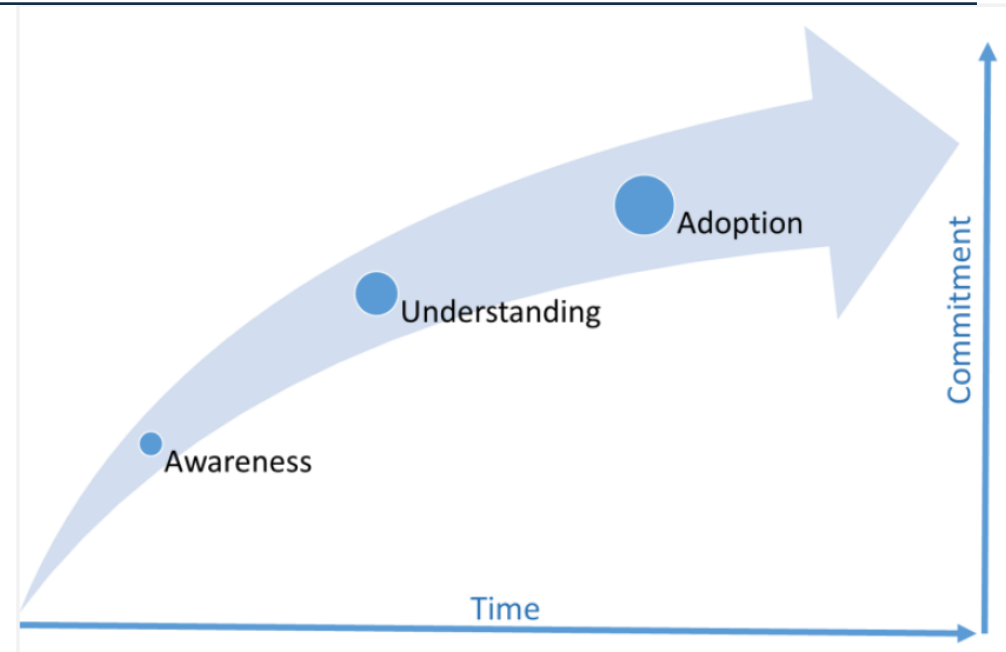# Organizational Change Management Framework – Proven Methodologies and Tools

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1. Leverage Your Resources and Make Them Your Own

"The difficult part is building and working the plan,
not understanding the concepts."

Common Denominators

1. Preparing for change

2. Planning for change

3. Managing change

4. Monitoring change

2. Document and Follow OR Guiding Principles

"OR is
People
doing Processes
that Profit."

An organization's greatest asset is its people, not users

OR Values Examples	OR Deliverables Examples
• Formal Process & Defined Methods • Reusable & Scalable Templates • Message Consistency *shared between Personas, when possible* • Quickly Consumable; Focused on *Personas* *"What's in it for me?"* • Right Content at the Right Time, Valuable, from most Credible Source *not spam* • Focus on Process, Outcomes *not on the tool* • Excitement and Fun – *part of company ROI*	• Impact Assessment and Needs Analysis • Communication Plan • Training Strategy • Communication Templates • Training Templates • Success Metrics • Lessons Learned

2. Document and Follow OR Guiding Principles

"OR is People doing Processes that Profit."

Assumptions Example	**Key (Reusable) Artifacts per Release** *Used for each onboarded group*
Quality of all communications must be high enough to be delivered only virtually	• **"Elevator Pitch"** with "5 why outcomes" *Business Need; Concept and Design*
Preferred Methods Examples	• **Logo and one-page Infographic** *Business Need; Concept and Design*
• General and Targeted Email • Targeted Training Invites • Intranet • Service SharePoint site • Leader Update Call • Leader Highlights Newsletter • Functional Town Hall • Interactive Training Presentations • Videos • System Portlets / Dashboards	• **Persona "What's in it for me?"** *Business Need; Concept and Design* • **Email and Invite Templates** from PMO for direct communication *Knowledge, Ability* • **Intranet Template** for general communication *Business Need; Concept and Design* • **Portlets Templates** *Knowledge, Ability, Reinforce* • **Video and Training PP Templates** hands-on exercise and quiz (CAPA) *Knowledge, Ability, Reinforce*

3. Communication Plan & Training Strategy

Impact of OR	Change Phase	Communication		Audience			
				Teams / General	Project Managers	Portfolio Managers	Leadership / Stakeholders

30%	**Cognizance & Craving**	**Kickoff of each release.**
		• **Calendar:** Leadership Update Meetings & Messages, Current News Intranet.
		• **Request: section to share artifacts**
		  • Train PPM Core Team
		  • "Elevator Pitch"
		  • Logo and 1 page Infographic
		  • Persona "What's in it for me?"
			Pain / Value
			WHY
				X	X	X	X

	Information *Education*	**Each onboarded group:** • Data load activities; Training preparation one-on-one, team conversations • *What to Expect* direct email • Video, PowerPoint, Virtual training direct invite	Perspective Conception **WHAT**		X	X	
20%	**Skills Building** *Training*	**Each onboarded group:** • Virtual Hands-On Training • Office Hours direct invite • PPM Certification?	Deliver **HOW**		X	X	
50%	**Fortification**	**Ongoing:** • System Portlets • Office Hours • Re-assess OR approach for next Release • Links: Process and Training Library • CAPA • Recorded Hands-On Training • Company Objectives – required for position • Formal Project Approvals and Stage Gates • *Health* audit	Operationalized Continued Efficiency & Value Realization **IMPROVE**		X	X	

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4. Define and Articulate "What's In It For Me?"

"Reused Consistent Audience Value Perspective."

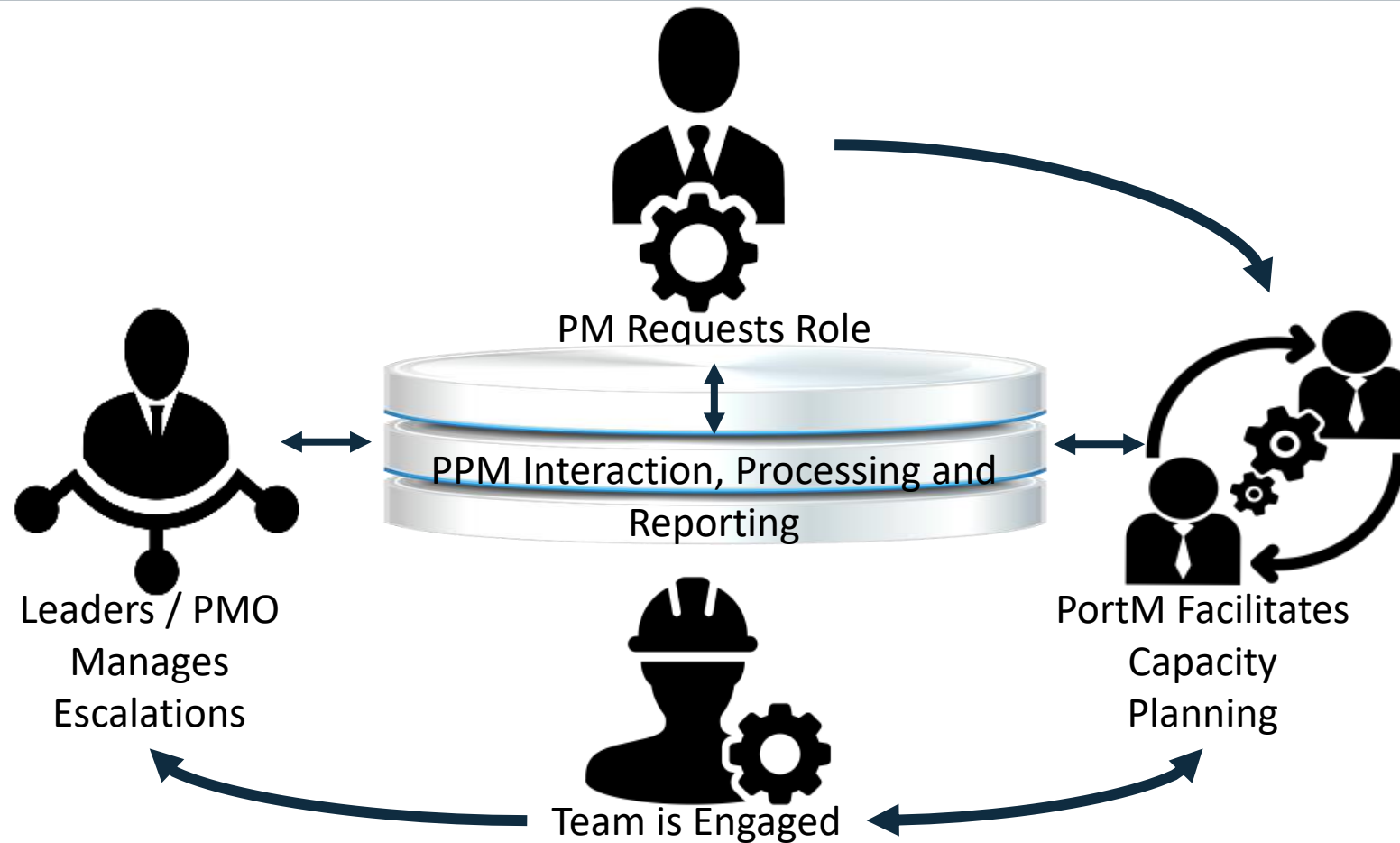| Project / Program Managers	Portfolio Managers	Leadership / Stakeholder	Teams / General

• Streamlined Process and System Best Practices
• Clear Escalation, Support of Project Status (Scope Schedule Budget), Risks Issues
• Project Team Roster Visibility
• Project Financial Reporting
	• Standard Information to Make Portfolio Level Decisions, Approvals, Changes
	• Process Cadence
	• Prioritization & Staffing Channels
	• Capacity Planning, What-If Scenarios
		• Concise, Consistent Reporting:
		  • Portfolio Level
		  • Ability to See Granularity of Project Status
		  • Risk, Issues
		  • Schedules and Teams
			• Know Assignments
			• Identify Over Allocations and Priority
			• Understand Project Demand and Current Status
			• Engagement of Business Objectives and ROI

4. Define and Articulate "What's In It For Me?"

"Reused Consistent Audience Value Perspective."

PM Requests Role

PPM Interaction, Processing and Reporting

Leaders / PMO Manages Escalations

PortM Facilitates Capacity Planning

Team is Engaged

5. Organize OR Artifacts

"Organize OR Artifacts: Plug and Play."

- OR Schedule

Date to Work	What to Build/Schedule	When to Deliver	Who is the Audience	Notes
Sample				

- OR Plans

Communication Type	Distribution Method	Audience	Types of Messages	Frequency
Sample				

Swag Bag (Key Takeaways)

1 The difficult part is building and working the plan, not understanding the concepts.

2 OR is People doing Processes that Profit!

3 OR Strategy: Why, What, How, Improve.

4 Reused Consistent Audience Value Perspective.

5 Organize OR artifacts: Plug and Play!

Refence additional regoUniversity content around Vision, Adoption, Metrics and Compliance

Questions?

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Let Rego be your guide.

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- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

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