



# Organizational Change Management Framework & PMO Integration

*Audience: PMO*

April 30, 2018



**Triumph Group**

# FOUR BIG PROBLEMS

How can IT manage all of the change being implemented?

Severe lack of awareness, at all levels of the organization

Users are not properly prepared for change

Users have a difficult time answering: How does this change impact me?

# Organizational Change Management

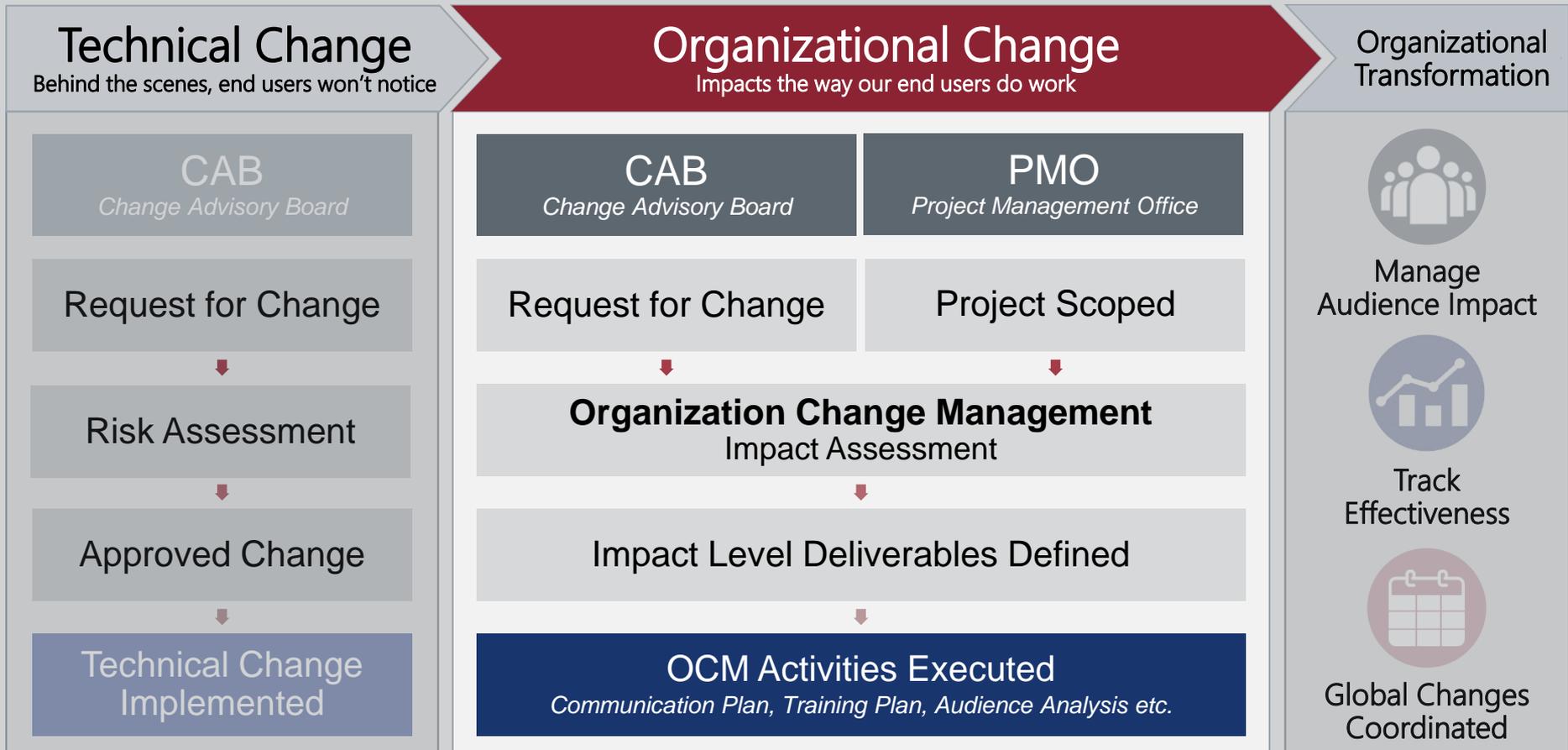
Systematically managing how an end user

**EXPERIENCES**

the changes we implement by

**increasing awareness &  
CREATING EMPOWERED USERS**

# Change Management Ecosystem



# How do we answer these questions?

How can IT manage all of the change being implemented?

Severe lack of awareness, at all levels of the organization

Users are not properly prepared for change

Users have a difficult time answering: How does this change impact me?

# Formal Organizational Change Management Program

*What does this look like? - Consistent deliverables across all projects*

## Impact Assessment

The assessment will reveal at what level you will be impacting the organization and the outcome of the assessment will influence the OCM deliverables you are required to complete.

## Communication Plan

Defining your messages and developing a road map for getting the right message to the right audience at the right time while ensuring you have all of the information curated and developed to execute the plan.

## Training Plan

Identifying the learning objectives for each area of knowledge and creating a strategy for building and deploying the training curriculum.

## Stakeholder Analysis

Determine what parties have a stake in the process and outcome of the project. The Stakeholder Heat Map will define how to engage who, when, and in what capacity.

# OCM Impact Assessment

*At what level will is your change impacting the organization?*

It all begins with a simple question.  
*Who are you going to be impacting with this change?*

OCM Impact

ONE BU OR SERVICE GROUP

MULTIPLE BUs OR SERVICE GROUPS

ALL TGI EMPLOYEES

## Low Impact



ONE BU OR  
SERVICE GROUP

*This change has little to no impact on the TGI business as a whole. The change needs to be managed, even if it is a small group of users.*

Impact  
Assessment

MANDATORY

Comms  
Plan

AS NEEDED

Training  
Plan

AS NEEDED

Stakeholder  
Analysis

AS NEEDED

# OCM Impact Assessment

*At what level will is your change impacting the organization?*

It all begins with a simple question.  
*Who are you going to be impacting with this change?*

OCM Impact

ONE BU OR SERVICE GROUP

MULTIPLE BUs OR SERVICE GROUPS

ALL TGI EMPLOYEES

## Medium Impact



MULTIPLE BUs OR  
SERVICE GROUPS

*This change requires awareness for most of TGI.  
Keep in mind the level of impact when planning  
the management of change.*

Impact  
Assessment

MANDATORY

Comms  
Plan

MANDATORY

Training  
Plan

AS NEEDED

Stakeholder  
Analysis

AS NEEDED

# OCM Impact Assessment

*At what level will is your change impacting the organization?*

It all begins with a simple question.  
*Who are you going to be impacting with this change?*

OCM Impact

ONE BU OR SERVICE GROUP

MULTIPLE BUs OR SERVICE GROUPS

ALL TGI EMPLOYEES

## High Impact

ALL TGI  
EMPLOYEES

*This impacts every single employee. All changes will be highly visible to senior management. Changes should be managed accordingly.*

Impact  
Assessment

MANDATORY

Comms  
Plan

MANDATORY

Training  
Plan

MANDATORY

Stakeholder  
Analysis

MANDATORY

# Communications

*Severe lack of awareness, at all levels of the organization*

The ultimate goal of project communication is to reduce fear of unknown by creating awareness

*We must ensure proper communication is planned and executed*

- Who, What, When, How, and WHY
- Branding
- Clarity of message
- Accurate audience
- Timing schedule
- Two-way feedback mechanism

# Communications

*Understand your communication needs and execute the plan*

## Communication Activity Alignment

*All items detailed below should be tracked and documented throughout the lifecycle of a change using the Communication Plan Template*

All items are aligned with PMO Gates

### Planning

Plan Developed & Approved

- Build the Plan
- Submit Plan for PMO gate review

### Execution

Revise Plan & Begin Execution

- Revise and Finalize Plan
- Develop Deliverables

### UAT

Finalize Deliverables & Continue Execution

- Finalize Deliverables
- Schedule Activities and Begin Communicating

### Go Live

Continue Executing Plan

- Continue Executing Communication Deliverables and Activities

### Closing

Communicate Project Closeout

- Project Closeout Communication
- Lessons Learned Analysis

# Training

*Users are not properly prepared for change*

The ultimate goal of Training is to properly prepare for change by creating empowered users

*Training ensures that our users are prepared*

- Training Plan Assessment
- Finalize strategy and plan
- Develop materials
- Schedule events
- Deploy training
- Post training assessments or survey

# Training

*Understand your training needs and execute the plan*

## Training Activity Alignment

*All items detailed below should be tracked and documented throughout the lifecycle of a change using the Training Plan Template*

All items are aligned with PMO Gates

### Planning

Plan Developed  
& Approved

- Build training plan

### Execution

Finalize Plan &  
Develop Curriculum

- Finalize training Plan
- Develop curriculum and training materials

### UAT

Finalize Curriculum  
& Deploy Training

- Finalize curriculum and materials
- Schedule and deploy training

### Go Live

Continue  
Executing Plan

- Continue training

### Closing

Complete Training  
Assessment

- Conduct post project assessment
- Lessons learned analysis

# Stakeholder Analysis

*How does this change impact me?*

The ultimate goal of a Stakeholder Analysis is to tailor change deliverables and messages for each stakeholder group

*Employees will be able to understand how, SPECIFICALLY, a change effects their work habits*

- This is a sensitive document only shared within the project team
- Understand your audiences and stakeholders
  - This can be individuals or groups of employees
- Analyze each stakeholder group across several measures:
  - Change Readiness
  - Understanding
  - Level of influence

# Stakeholder Analysis

*How does this change impact me?*

## Stakeholder Activity Alignment

*All items detailed below should be tracked and documented throughout the lifecycle of a change using the Stakeholder Analysis Template*

All items are aligned with PMO Gates

### Planning

Analysis Developed & Approved

- Define Stakeholders and Conduct Analysis
- Stakeholder Heatmap Generated & Approved

### Execution

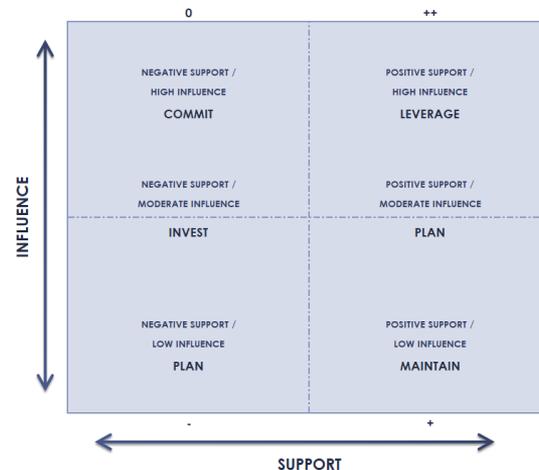
Revised & Utilized

- Update the Analysis with new information
- Apply the findings from the Heatmap

### UAT

Revised & Utilized

- Update the Analysis with new information
- Apply the findings from the Heatmap



# How do we answer these questions?

How can IT manage all of the change being implemented?

Manage the impact levels and predictably deliver

Severe lack of awareness, at all levels of the organization

Understand your communication needs and execute the plan

Users are not properly prepared for change

Develop a robust training program that empowers end users

Users have a difficult time answering: How does this change impact me?

A detailed map answering “**How does this impact me**” for each stakeholder group

# Formal Organizational Change Management Program

*How do we do it? - OCM and PMO Integration*

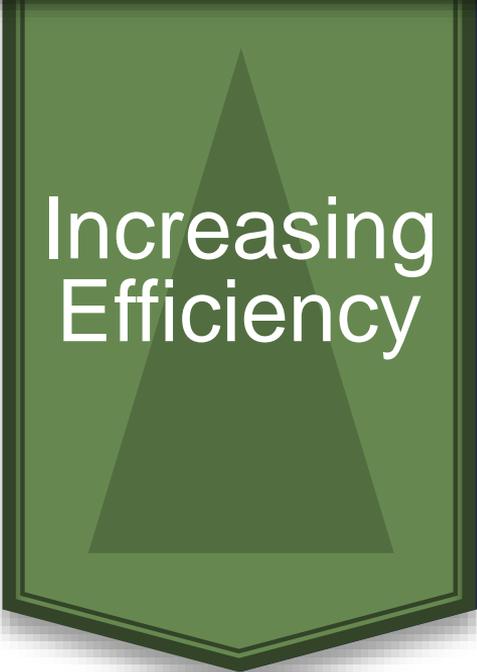
PMO GATES	Proposal	Discovery	Planning	Execution	UAT	Go Live	Closeout
OCM PRINCIPLES	Predicting the Impact	Understanding the Impact	Planning for the Change	Managing the Change	Preparing for the Change	Sharing the Change	Finalize the Change
OCM DELIVERABLES	Impact Assessment Prediction	Revisit Impact Assessment	Finalize Impact Assessment Communication Plan Developed & Approved Training Plan Developed & Approved Stakeholder Analysis Developed & Approved	Revise Plan & Begin Execution Finalize Plan & Develop Curriculum Stakeholder Analysis Revised & Utilized	Finalize Deliverables & Continue Execution Finalize Curriculum & Deploy Training Stakeholder Analysis Revised & Utilized	Continue Executing Plan Continue Executing Plan	Complete OCM Lessons Learned Communicate Project Closeout Complete Training Assessment

# Formal Organizational Change Management Program

*How does it help the IT Organization? - Expected results and reliability*



Reducing  
Risk



Increasing  
Efficiency

- ✓ Avoid mass confusion in the middle of project for project team and end users
- ✓ Avoid missing necessary or critical activities
- ✓ Alignment of Resources – Project, IT, and Support
- ✓ Toolkit of templates and plans
- ✓ Alignment of IT Portfolio to minimize impact on end users
- ✓ Increase IT Brand recognition and trust