ORGANIZATIONAL CHANGE MANAGEMENT

CHANGE TOOLKIT

HOW TO USE THE GUIDEBOOK

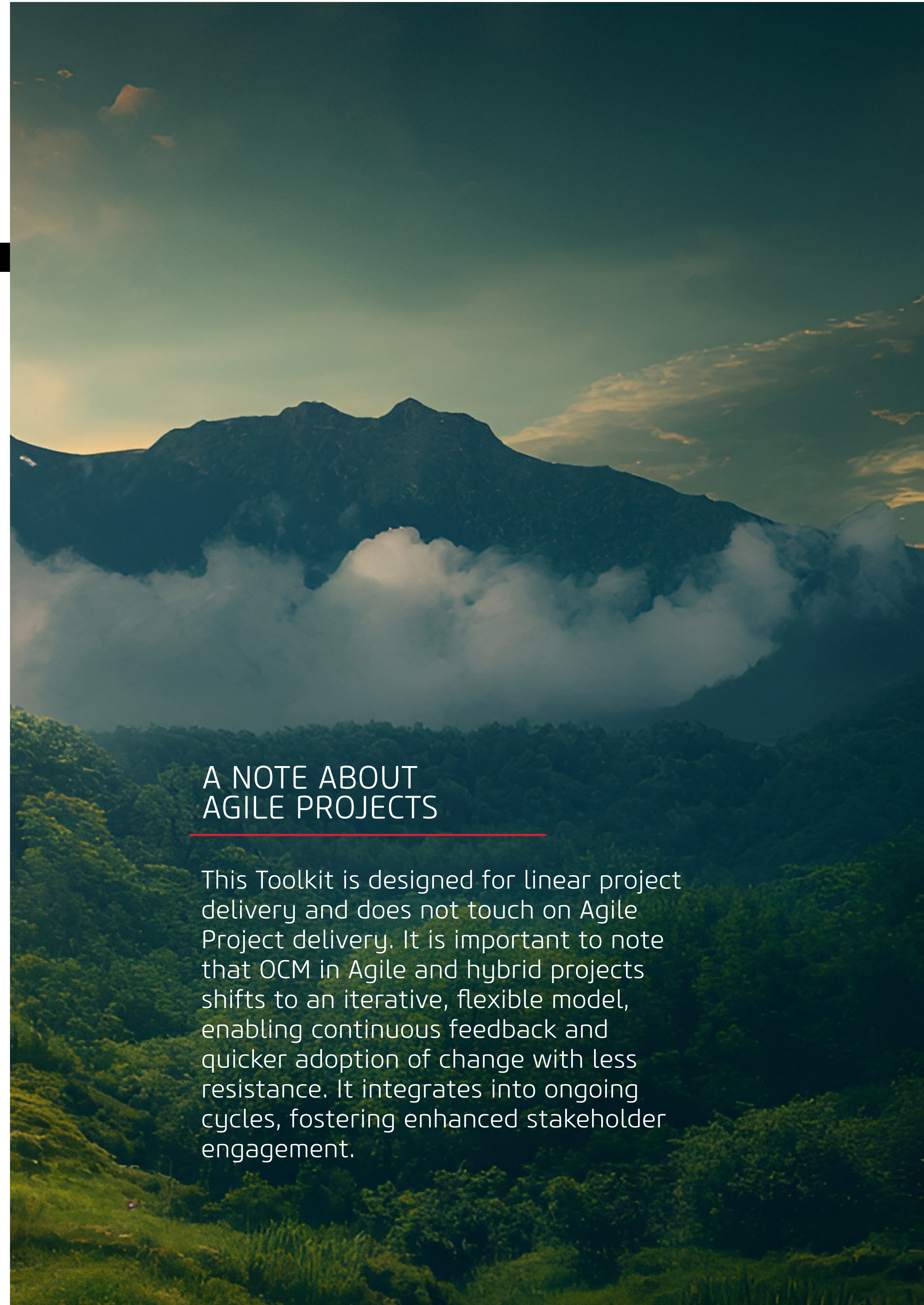
The OCM Toolkit contains useful resources and templates to help prepare for change, manage change, and reinforce the change.

The Toolkit contains two (2) items that should be used together:

- ***Guidebook -*** This guidebook provides you with information needed to help you manage the change and provide insights into how to use each template.

- ***Organizational Change Management (OCM) Templates*** - This separate file includes fillable copies of the templates that are referenced:

    - Prepare for Change
    - Description and Objectives
    - People Risk Assessment
    - Stakeholder Analysis
    - Change Plan
    - Readiness Checklist



A NOTE ABOUT AGILE PROJECTS

This Toolkit is designed for linear project delivery and does not touch on Agile Project delivery. It is important to note that OCM in Agile and hybrid projects shifts to an iterative, flexible model, enabling continuous feedback and quicker adoption of change with less resistance. It integrates into ongoing cycles, fostering enhanced stakeholder engagement.

OCM METHODOLOGY & KEY DELIVERABLES

OCM methodology has three phases: Prepare, Manage, and Reinforce. During each phase, a set of change management activities are executed and result in key deliverables for each phase.

PREPARE

- Review case for change objectives and business case/project charter
- Identify stakeholders and assess their needs
- KPI Assessment
- Understand the impacts to the people and processes
- Assess people risks

Key Deliverables

- Description and Objectives
- Stakeholder Analysis
- People Risk Assessment

MANAGE

Develop the Change Management Plan including:

- Communication activities
- Engagement activities
- Training activities
- Coaching Plan activities
- Resistance Management activities
- Sponsorship/Leadership activities
- Transition to Business activities

Key Deliverables

- OCM Plan Execute the
- Change Plan activities
- Business Readiness Checklist

REINFORCE

- Continue to monitor engagement activities
- Collect and analyze feedback
- Implement corrective action
- Celebrate successes

Key Deliverables

- Execute Reinforcement activities captured in the change plan

The Manage and Reinforce phases are iterative processes. As more information becomes available or as you monitor and assess the outcome of your activities, you may need to revisit previous deliverables and implement additional or different change management activities.

TOOLKIT WORKBOOK TEMPLATE

1. PREPARING FOR CHANGE

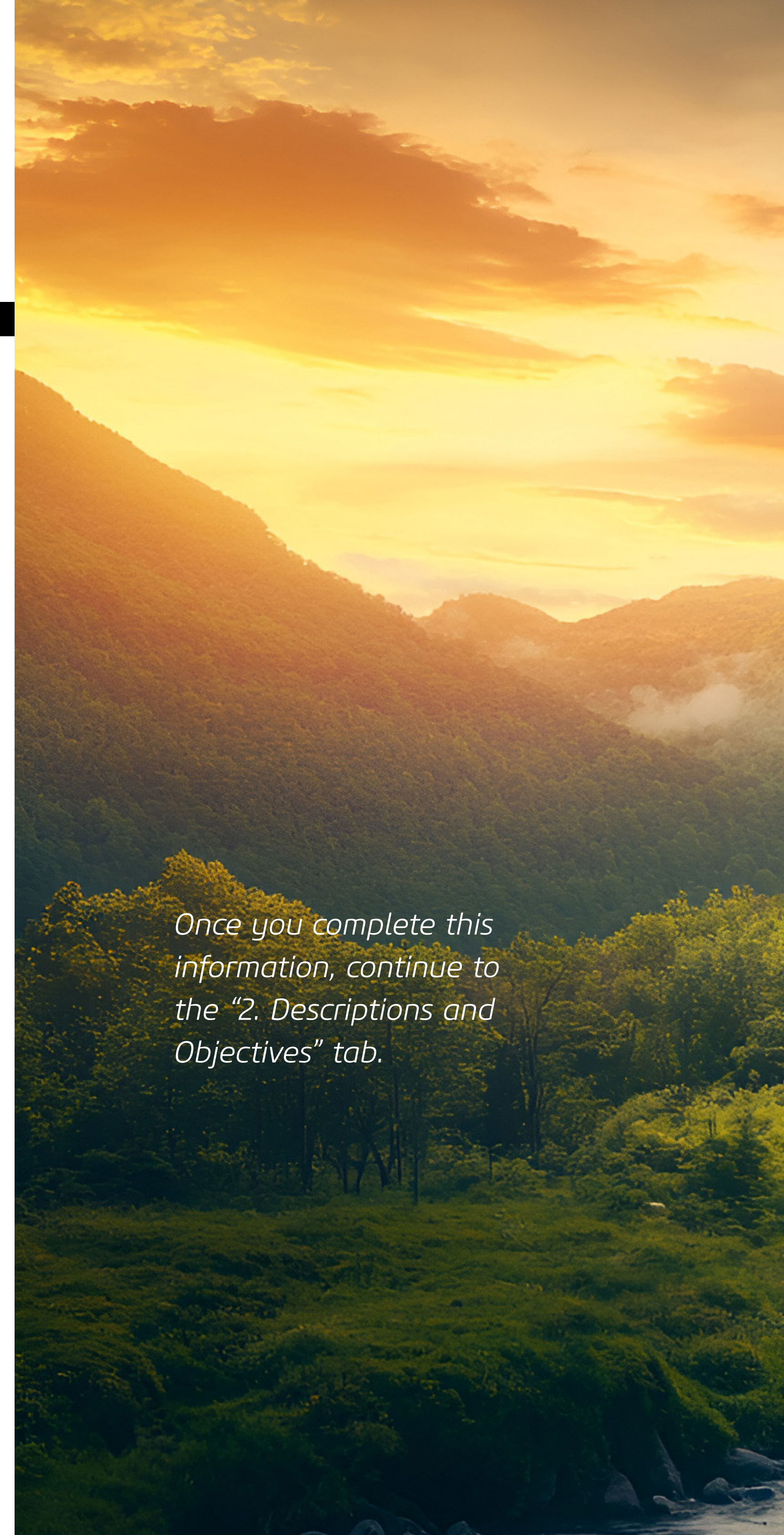
Before getting started, you require some critical information and documentation. If you haven't already, open the Toolkit Workbook to the first tab "1. Preparing for Change".

This template asks you foundational information about the Project or Initiative. Based on this information, you should be able to begin managing your change.

online PREPARING FOR CHANGE

Here's a checklist of key information that will help you with the change activities. These questions are foundational information that should be accessible when you begin the change management work.	
Is there a project charter? Yes/No	Ideally there is a project charter, that outlines the scope, objectives and business drivers for your change.
Which strategic priorities does the change align with?	
Project/Initiative Name	
Name of Project Manager/Core Team members	
Name of Executive Sponsor/Primary Project Sponsor	
What are the Goals/Objectives of the change?	
Is the project phased? If yes, what are the objectives/deliverables for each phase?	
Target Start and End Date	

Results. Guaranteed.



TOOLKIT WORKBOOK TEMPLATE

2. DESCRIPTION AND OBJECTIVES

To prepare people, it's vital that we fully understand why this change is being made, what is changing, and the benefits. In this step, you should work with the leaders and others involved with the project to define as much as you can before proceeding to plan.

The answers to many of these questions should be captured in the business case or project charter. If they're not, it warrants a discussion with the group responsible for executing the tasks and producing deliverables outlined in the project plan or critical stakeholders that are highly impacted

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DESCRIBE THE GOALS & OBJECTIVES OF THE CHANGE

Description and Objective of Proposed Change (e.g. system, behaviours, high level description of the current state vs future state)

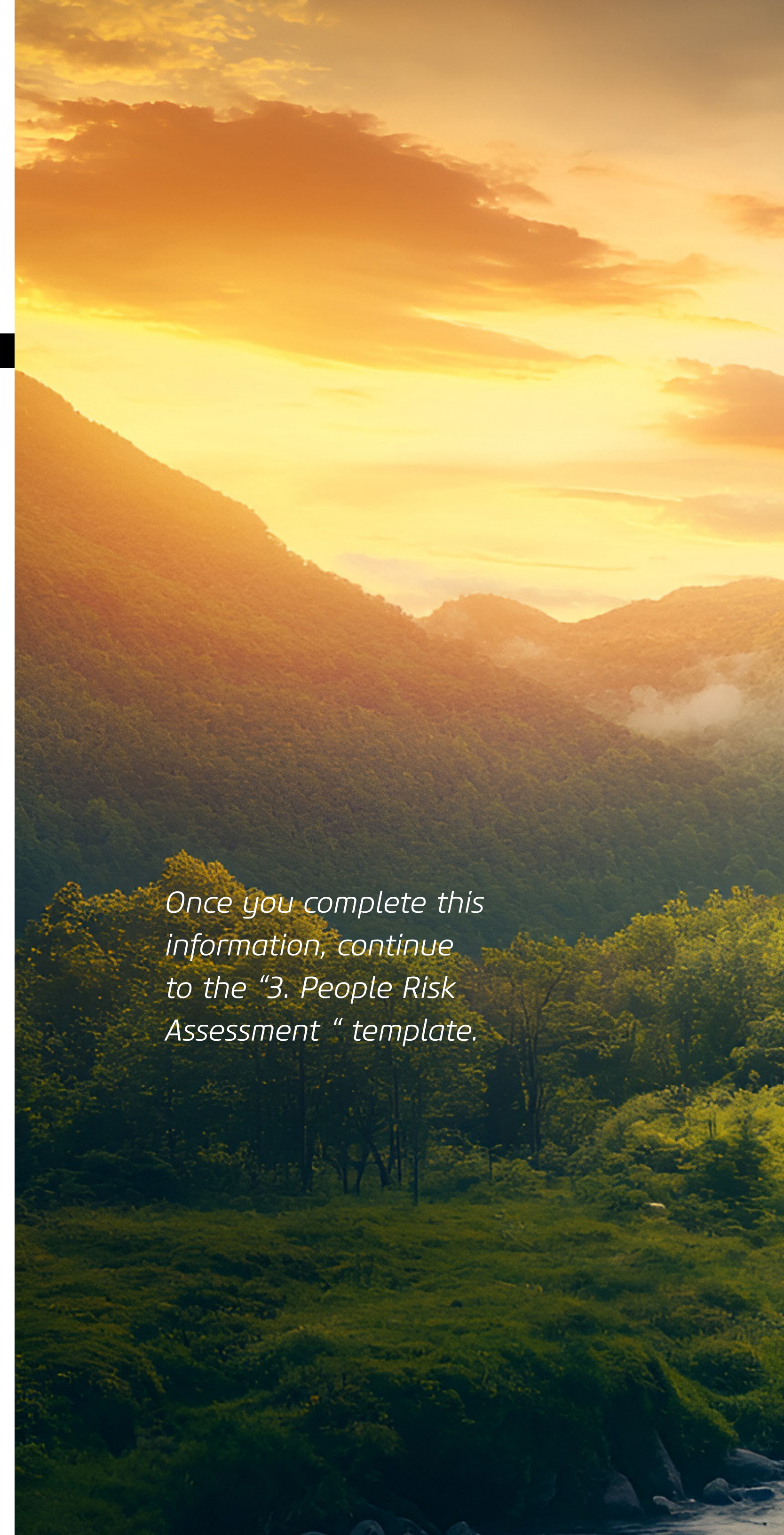
Business driver for change; internal and/or external pressures that make changes necessary (e.g. strategy, structure, products, services, operations)

Consequences of not making the change (e.g. won't remain competitive, lose market share, regulations not met)

Objectives or expected benefits as defined in the project charter or business case (e.g. improved customer service, improved customer and/or employee satisfaction and/or retention, quality improvement, cost reduction)

What metric will you use to measure how effective you are at achieving the business objectives? (e.g. NPS, Average ticket/support resolution time, Employee Engagement Score, etc.)

Results. Guaranteed.



TOOLKIT WORKBOOK TEMPLATE

3. ANTICIPATE & CONSIDER THE PEOPLE RISKS

People risk can be defined as not following the new procedures, practices, and rules, which may negatively impact the initiative/project's outcome. The tips in the workbook will aid you in identifying, describing, and planning how to mitigate risks to tackle or avoid common pitfalls.

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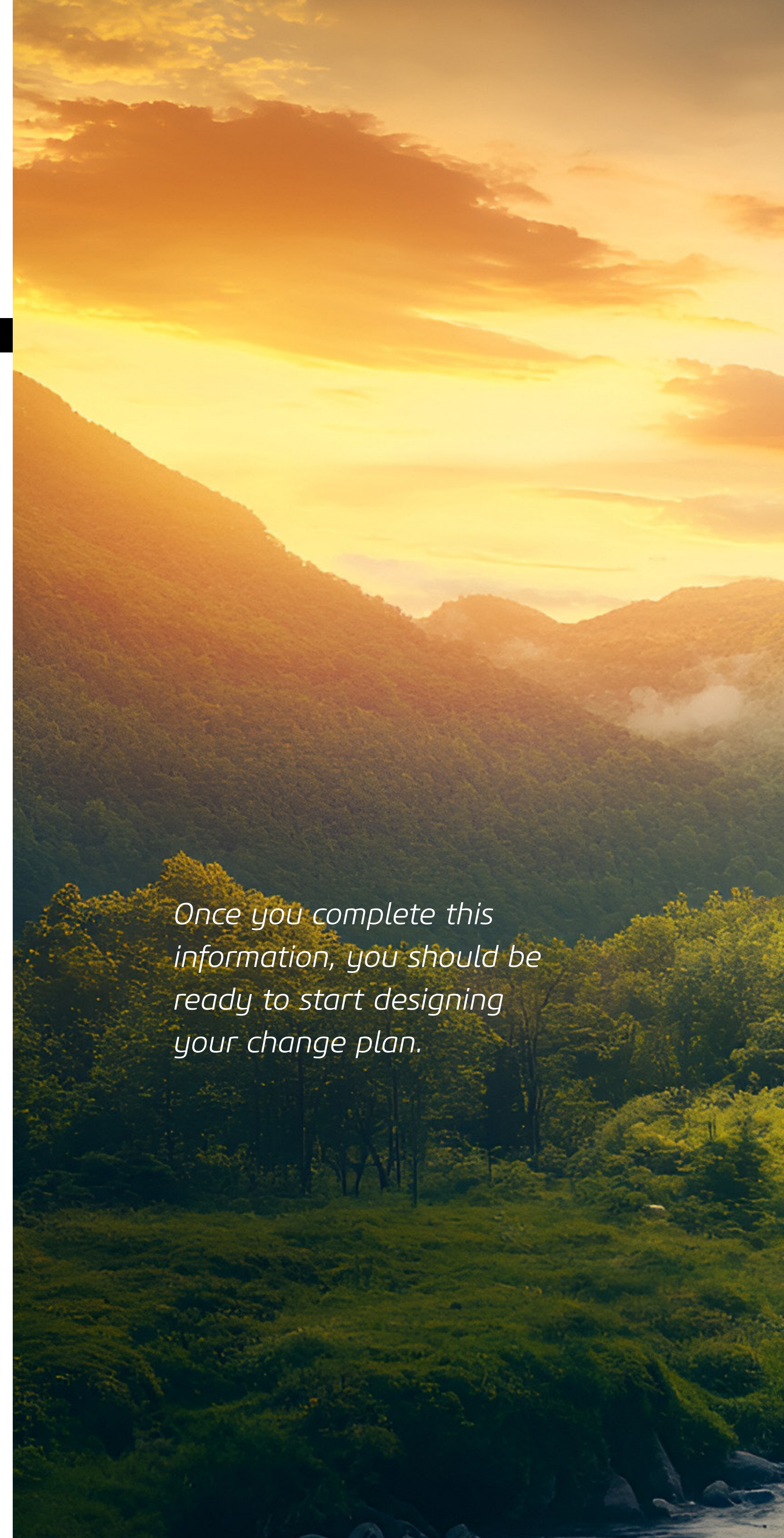
ANTICIPATE & CONSIDER THE PEOPLE RISKS

Risk Description	Risk Mitigation

Results. Guaranteed.



TOOLKIT WORKBOOK TEMPLATE

4. STAKEHOLDER ANALYSIS

A stakeholder analysis is used to identify and determine how best to involve and communicate with each stakeholder group throughout the project based on how they will be experiencing the change, their participation, interest, or influence with the change.

The stakeholder analysis should be completed in collaboration with sponsors, leaders, and Subject Matter Experts. It should be started early in the project when there is a general understanding of the impacts and the degree of impacts for each stakeholder.

It is iterative - as the project progresses, the understanding of the impacts increases and allows for a more detailed stakeholder analysis.

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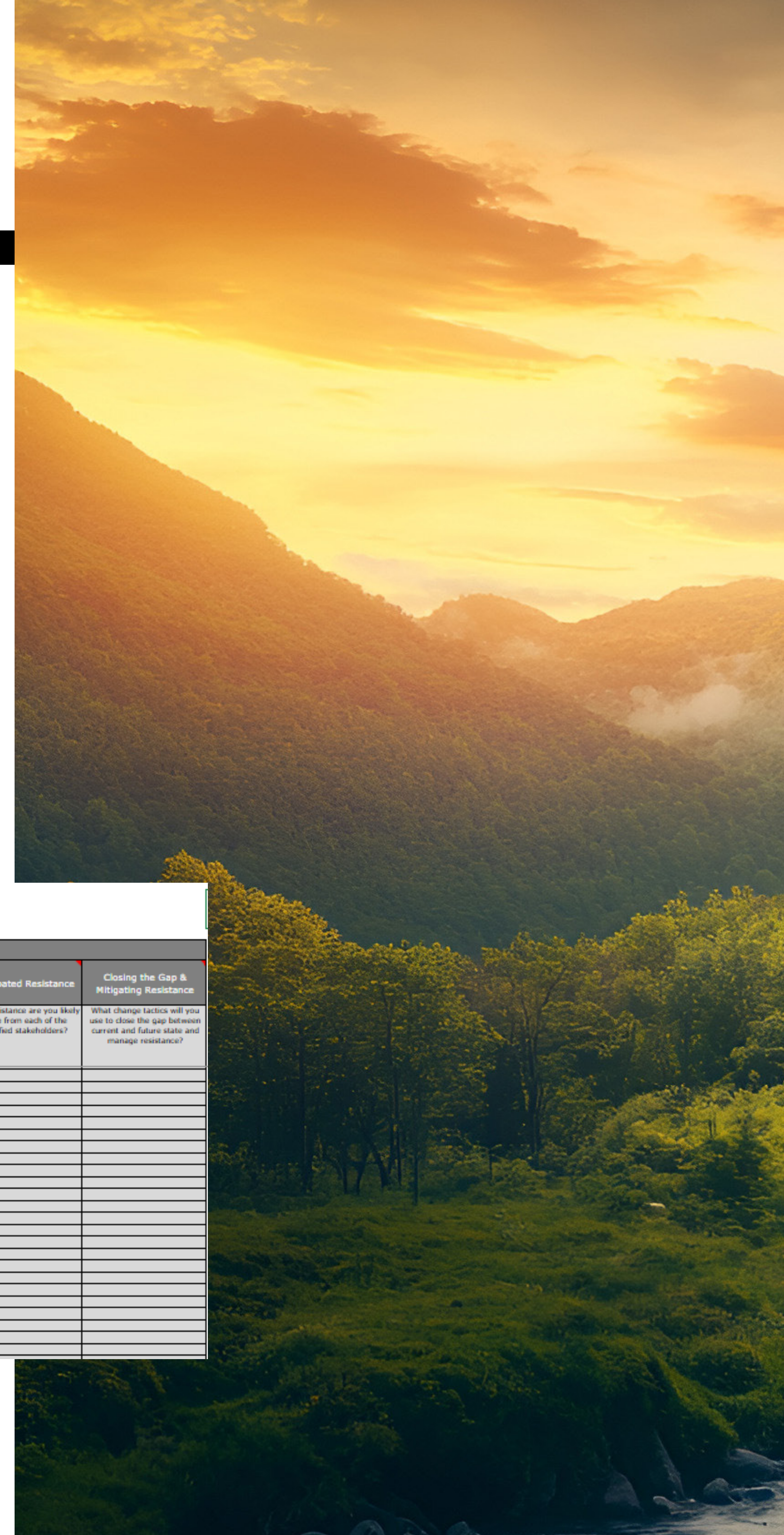
Who are your Stakeholders? How does the change impact them?

STAKEHOLDER ANALYSIS				IMPACT ASSESSMENT						
Who is impacted by this change or needs to know about this change?	Power-Interest Quadrant	How will we work with this stakeholder group?	# of Employees Impacted	What is changing?	How much effort is needed for this group to adopt this change?	Current State	Future State	Gap Description	Anticipated Resistance	Closing the Gap & Mitigating Resistance
List all stakeholder groups by job title. Allow for as many rows between each stakeholder group as changes (What is Changing column).	Use the drop down to select Keep Satisfied, Manage Closely, Monitor or Keep Informed.	Use the drop down to select whether we need to consult, inform, train or collaborate with this stakeholder group.		Use the drop down to select what is changing.	Use the drop down to select from Low, Medium, High or Awareness.	Describe how things are handled or used today. List the key activities performed that will change in the future.	Describe how things will be handled in the future.	Describe the difference between Current State and Future State.	What resistance are you likely to see from each of the identified stakeholders?	What change tactics will you use to close the gap between current and future state and manage resistance?



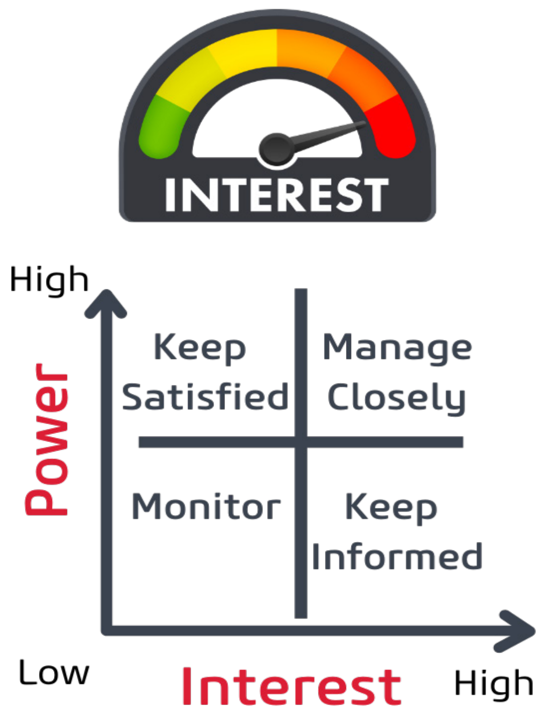
TOOLKIT WORKBOOK TEMPLATE

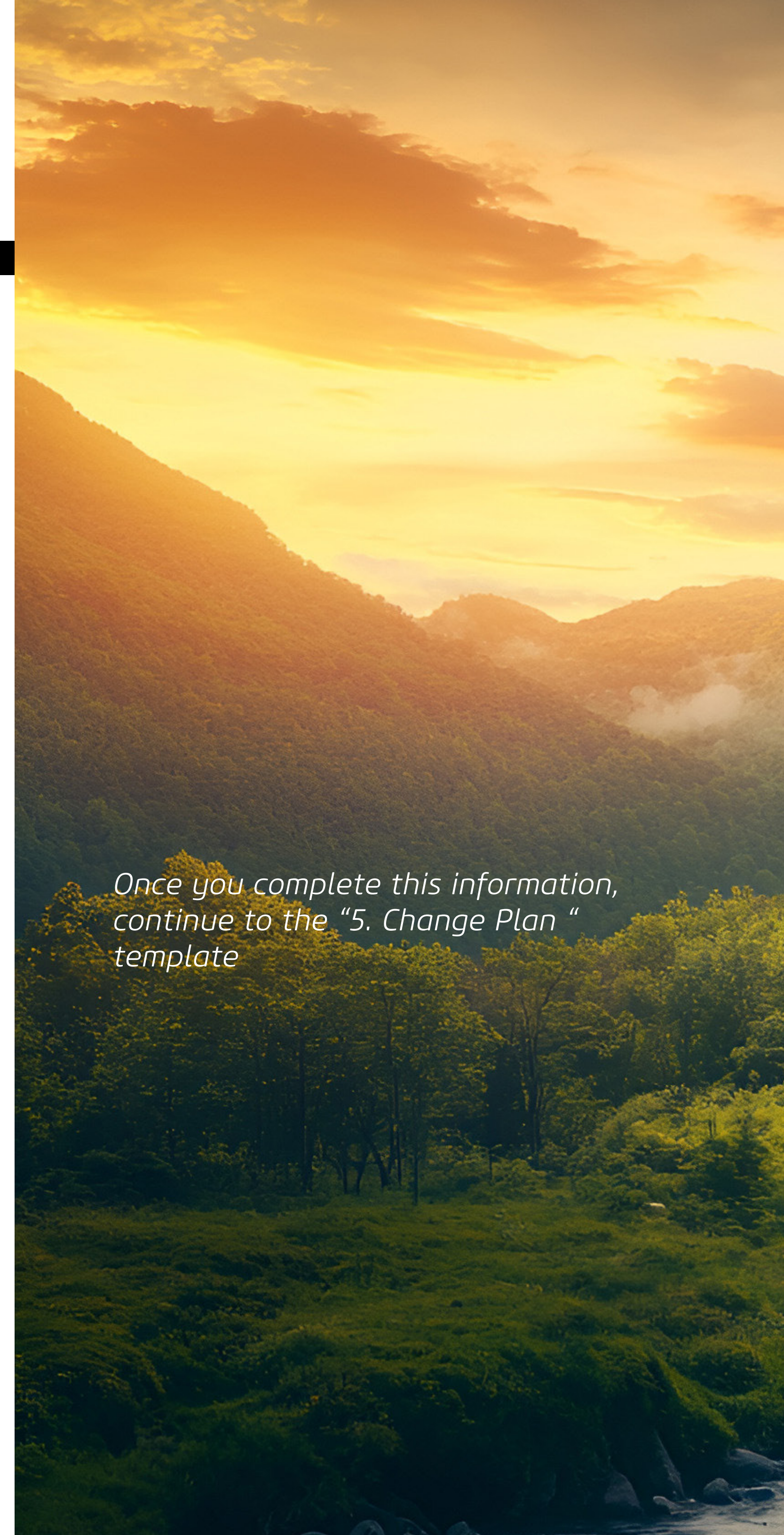
4. STAKEHOLDER ANALYSIS CONT'D

THE POWER-INTEREST GRID

The power interest grid is a helpful tool in determining and managing stakeholders. Reference: www.mindtools.com

Determining the “Power-Interest” quadrant that a stakeholder is in will help you identify the impact, and the level of action needed to support them through the change.





Once you complete this information, continue to the “5. Change Plan “ template

TOOLKIT WORKBOOK TEMPLATE

5. CHANGE PLAN TEMPLATE

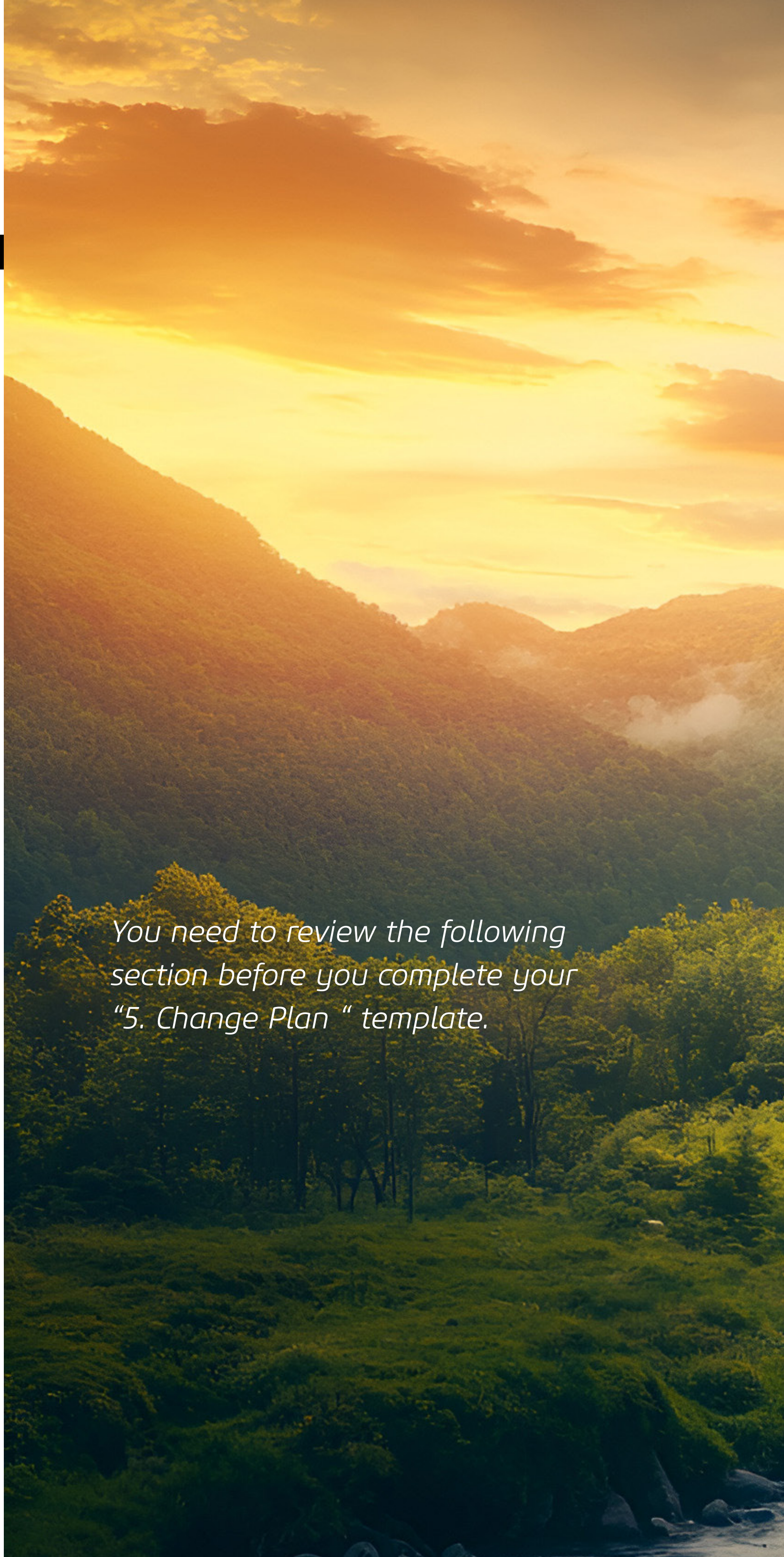
A change management plan helps manage the change experience. The change management plan defines the activities and outcomes needed to minimize the impact a change can have on the business, employees, customers, and other important stakeholders.

This plan captures all activities and actions needed to be completed before, during, and after implementation. While building the plan, consider each stakeholder group, appropriate actions, timing, key messages, what gaps need to be addressed, what content is needed, who owns the task, who actions the item and who approves the activity.

There are some key actions that must be considered, they are outlined next. In addition, there are tips in the workbook to help you complete each field. Most of your effort leading the change will happen here.
Take time, have discussions, and capture all the activities needed.
Proper planning now, will drive successful change later!

online Develop your Change Plan. Determine your actions.

Action	Target Delivery Date	Order/ Sequence	Status	Messenge	Stakeholder Group/Audience	Key Messages/Objective (list in bullet form)	Medium/ Channel	Content Responsibility Owner	Approver(s	Approval Date



You need to review the following section before you complete your "5. Change Plan " template.

CHANGE PLAN: EXPLAINING ACTIONS

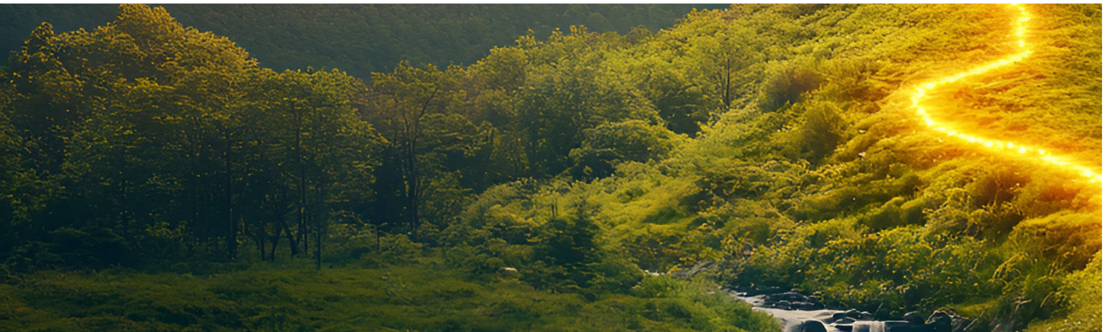
These 12 actions are found listed in the dropdowns for both the Closing the Gap and Actions columns in the template. Below, you will find helpful information to identify and create the change management actions you should include in your plan to prepare your Stakeholders.

1 SPONSOR / LEADERSHIP

Sponsor involvement and effectiveness directly correlate to project success. Effective sponsorship means actively and visibly participating throughout the project, building a coalition of sponsorship with peers and managers to help support, enable and prioritize the change, and communicating directly with employees.

Common examples of these actions include:

- Provide behind-the-scenes assistance and coach theSponsor/Leader in:
    - Defining what different roles they will play to help employees thrive through change.
    - Creating a clear understanding and plan for reaching the right audiences with the right messages at the right times, to drive positive business outcomes.
    - How to align critical stakeholders, priorities, work through cross organizational conflicts, and provide visible leadership and communication to build and maintain momentum for change.
- Hold regular meetings with the Sponsor/Leader.
- Hold the Sponsor/Leader accountable in their role.



2 COMMUNICATION / ENGAGE

Communication actions should include objectives, the tools used to produce communications and intended recipients. Communication focuses on what to say and whom to say it to, and when to say it. Engagement allows for 2-way communication that provides an opportunity for stakeholders to feel informed and involved with the change.

It would help if you considered these:

- Identify audiences, identify key messages and timing, determine content packaging, delivery method, frequency, and preferred sender, review your plan with the project team for input.
- Repeat messages using multiple vehicles - email, newsletters, face to face, questions, and answers.
- Create key messages customized for the audience and include an answer to "What's in it for me", messages about the business today, messages about the change (why, why now, a consequence of not changing), messages about how the change impacts employees, status updates and progress. They should also be unique to each phase of the project.
- Identify the most influential sender - Executives and Senior leaders - typically your Sponsor - are the preferred sender of business messages. Example: the announcements, timelines, why the change is needed, consequences of not changing.
- Employee's Manager or Supervisor is the preferred sender of personal messages. Example: Current vs Future state, training timelines, performance expectations.

*Note: If the communication is enterprise-wide or using a corporate vehicle, be sure to involve Corporate & Employee Communications.

CHANGE PLAN: EXPLAINING ACTIONS (CONT'D)

3 COACHING

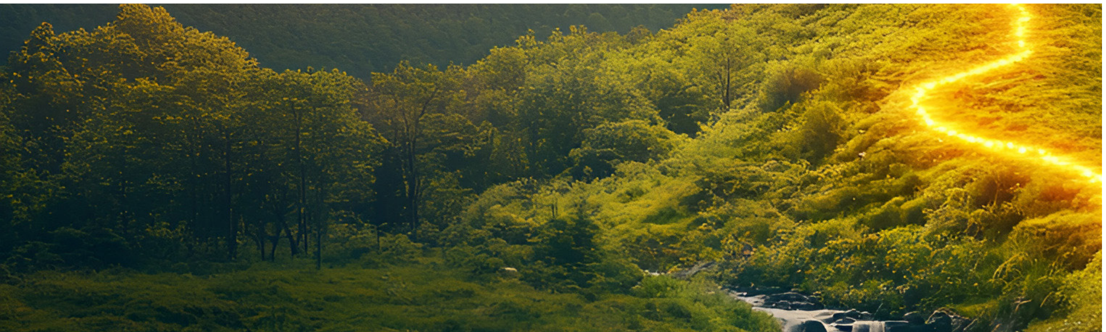
Coaching actions ensure that supervisors and managers are enabled to become effective change leaders by identifying the tools and support they need and providing ongoing support to collect data needed to assess performance.

Coaching can help them understand their role in leading employees through change, fulfill their role as change leaders and understand and manage resistance to change.

Identify activities to help supervisors and managers understand their role in leading employees through change, fulfill their role as change leaders and understand and manage resistance to change.

Examples of coaching actions include:

- Calls to action
- 1:1 discussion
- Providing key messages
- Helping leaders think through introducing and implementing changes within their teams.
- Guiding them on recognizing and managing resistance



4 COLLECT & ANALYZE FEEDBACK

Collecting and analyzing feedback has three steps:

- Listen to employees and gather feedback.
- Audit compliance with new processes, systems, and job roles.
- Analyze the effectiveness of your change management activities.

Examples of feedback actions include:

- Collect the employee feedback and data indicating adoption of the change through surveys, team meetings, 1:1, etc.
- 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 effort and identify weaknesses.

5 DIAGNOSE GAPS

Based on the feedback and adoption results, determine the root cause of the problem. Continue to ask the question "Why is this happening" until you have found the root of the problem.

It would help if you considered these:

- Root problems may include resistance, the need for additional training or individual coaching, not understanding the why and what's in it for me.
- Provide sponsors, managers and supervisors with the information and tools to implement corrective actions.

CHANGE PLAN: EXPLAINING ACTIONS (CONT'D)

6 MANAGE RESISTANCE

Do not be surprised by resistance! Even if the solution a project presents is a fantastic improvement to a problem plaguing employees, there will still be resistance to change. Comfort with the status quo is compelling. Fear of moving into an unknown future state creates anxiety and stress, even if the current state is painful.

When creating actions to manage resistance, consider these:

- Top Reasons for Employee Resistance: Lack of awareness for why change is needed, not understanding what's in it for me, impact on current job role, organization's past performance with change, lack of visible support and commitment from managers, fear of job loss, and change fatigue.
- Listen and understand objections, focus on the 'what' and let go of the 'how', remove barriers, if possible, provide simple clear choices and consequences, create hope, show the benefits in a real and tangible way.

7 ACTIVITY

Activity is a catch-all for anything not included in the dropdown list of Actions.

8 TRAIN

The role of change management in training is to provide guidance around:

- The training schedule (make sure it's not too early/not too late).
- Ensuring the key messages are reinforced during training.
- Identifying the audiences that need training.
- Whether training can be conducted with multiple groups or if groups need individual sessions and the sequencing of those sessions.

Examples of training actions include:

- Scheduling working sessions with the Learning and Development department or Subject Matter Experts responsible for creating the training plan, design and delivery of training and training materials Subject Matter Experts will provide input as will the Communications lead.
- Sharing your Stakeholder Analysis with L&D and/or other SMEs
- Track when and how training will take place.

CHANGE PLAN: EXPLAINING ACTIONS (CONT'D)

9 TRANSFER OWNERSHIP TO BUSINESS

The change management actions will eventually become about maintenance of the change and less about preparing for or implementing it. At this point, the operational managers can take over.

Examples of the actions you should plan for transferring ownership are:

- Conduct/participate in Lessons Learned, workshops (e.g. what worked, what did not?).
- Inform of plans to transfer ownership.
- Determine what outstanding issues or needs must be addressed prior to the transfer.
- Coordinate the timetable for the transition.

10 IMPLEMENT CORRECTIVE ACTION

Determine the appropriate steps to take to address the root cause of the gap. For each problem area, prepare for the Subject Matter Expert, Leader, Manager or Supervisor the following:

- Findings from feedback and compliance audit
- Root cause of these performance gaps
- Based on determination of root cause prepare a plan for addressing each cause. This may include resistance management, additional communications, sponsorship, coaching, and training.
- Supervisors or managers (including key stakeholders and primary sponsors) are most effective in completing the corrective actions.

Please ensure that you review your draft plan with the project sponsor and key members of your project team, in addition to a few high impacted stakeholders.

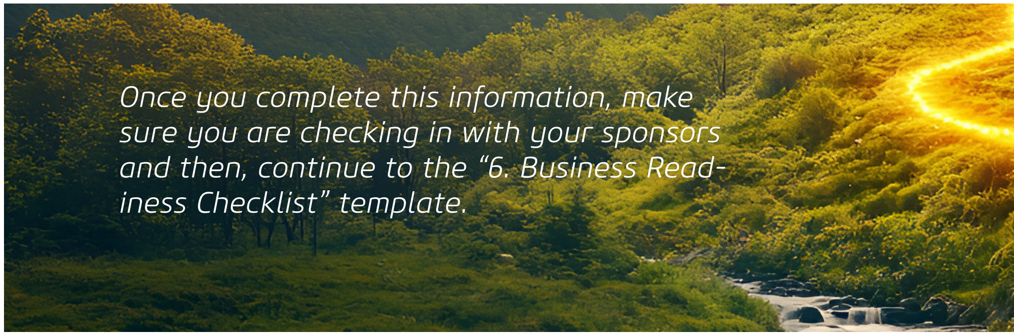
It's essential to have multiple critical business lenses to drive more robust actions, considerations, risks, and solutions.

11 CELEBRATE SUCCESS

Constantly seek out evidence of progress in the project. Watch for the achievement of major milestones and identify early successes, even if small. Organize ways to recognize groups and individuals that have achieved success.

Examples of reinforcement actions include:

- Make it public.
- Use normal staff meetings or regularly scheduled department meetings as an avenue for recognition of achievement.
- Ensure that key stakeholders are aware of these achievements and involve managers in awarding these recognitions.
- Communicate

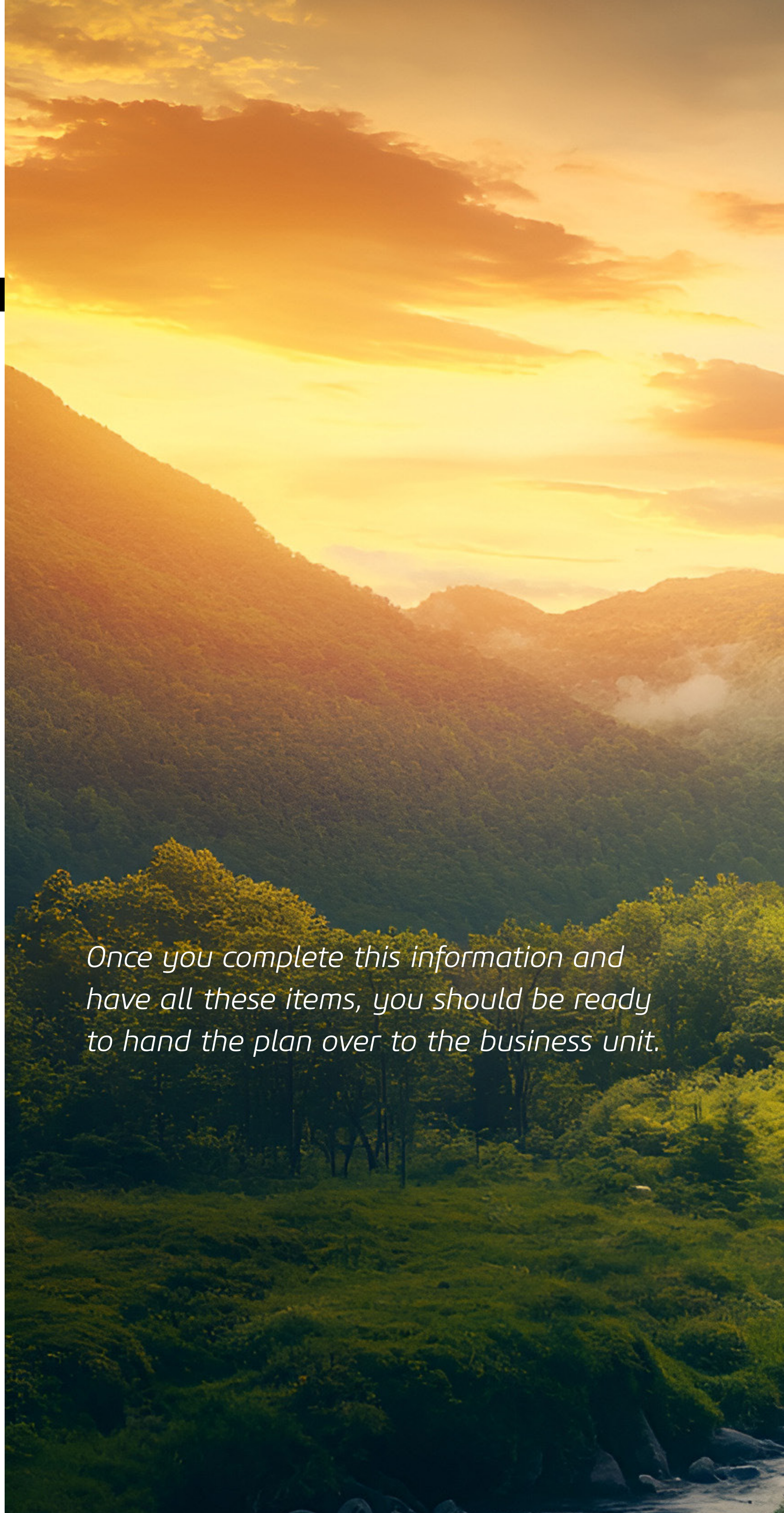


6. BUSINESS READINESS CHECK-LIST TEMPLATE

You want to be sure that you've built a change plan that captures all the activities needed and addresses all the gaps to prepare the stakeholders for the change. This template provides a checklist to help you ensure you have done so. If you've answered yes to all of them, you are ready to execute! If you've answered no to one or more, we strongly suggest you should not go live until they are completed.

online Business Readiness Checklist - Are you ready?

Have you:	Yes/No	Comments
All impacted internal and external stakeholders have received appropriate communications to have a sufficient level of awareness for Go-Live		
There is an appropriate feedback/communication mechanism in place to manage questions arising from Go-Live		
All impacts are adequately addressed and appropriate mitigation actions are in place for Go-Live (no change management related showstoppers) - for both internal and external stakeholders		
All critical stakeholders are trained, as per plan. Non-critical stakeholder training and activities are planned. Supporting documentation (e.g. FAQs, job aids) are delivered and accessible		
All people risks related to Go-Live have been mitigated and managed		
Metrics, assessment mechanisms, reporting, etc are in place to provide data for the assessment of gaps, need for corrective actions and change Effectiveness		
Owners of the activities after Transfer to Business are identified and clear on their roles and responsibilities in maintaining the change		



Once you complete this information and have all these items, you should be ready to hand the plan over to the business unit.

YOU'VE REACHED THE TOP! CONGRATULATIONS ON COMPLETING YOUR CHANGE MANAGEMENT PLAN

Completing this change management plan is a significant milestone in your organization's transformation journey. This accomplishment reflects your dedication to strategic planning and commitment to excellence.

As you transition from planning to implementation, remember that this is the beginning of a new chapter. With the strategies and tools you've developed, you're well-prepared to navigate the complexities of change and drive meaningful progress.

Embrace this opportunity to lead with confidence, fostering a culture of innovation and adaptability. Your efforts will not only achieve immediate objectives but also lay the foundation for sustained success in the evolving business landscape.

online business systems

Contact:
Online Business Systems
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SOME COMMON PROBLEMS USING MICROSOFT EXCEL IN OFFICE 365

We have included some tips on using Microsoft Excel in Office 365; as you've probably experienced in the past it isn't always the best visual display for content. But if you use some of the following tips, you can undoubtedly help the data look great. Here are some of the most common things you might encounter in data in excel.

Adjusting the row height - To ensure you see everything in the cell, you can adjust the row height by double-clicking your mouse on the line between the two rows on the left-hand column.

Start a new line of text inside a cell - To start a new line of text or add spacing between lines or paragraphs of text in a worksheet cell, move the cursor inside the cell to the location or end of your sentence, then press Alt+Enter to insert a line break.

Insert bullets in a worksheet - Select a blank cell, and then on the Insert tab, click Symbol. Select the Bullet symbol. Then click Insert and Close. Then type in your bullet statement.

Create an indent - First, select the cells you want to format. Then Right-click and select Format Cells. Click the Alignment tab. Under Text alignment, in the Horizontal box, select Left (indent). Toggle how many indents you want in the Indent field.

Create a hanging indent - A Hanging indent, also known as a second line indent, sets off the first line of a paragraph by positioning it at the margin and then indenting each subsequent line.