playbook

CHANGE DELIVERY

The following slides will help you articulate what, when, why, and **how** you will deliver your change.

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essential DELIVERY TOOL

Imagine you are tasked with delivering a change in your organization.

The organization has no toolkit, they've never had a change manager before, and the project doesn't know what to expect.

This is your change delivery playbook.

Use it to spark creativity and help you document, design, socialize, and deliver your change.

OCM DELIVERY ROADMAP

01 ASSESS
...ect/Program

02 DEVELOP
- Establish Change Management Group
- Choose Change Approach & ...

03 DELIVER
- Implement Change Plans
- Deliver communications
- Engage stakeholders
- Manage Change Champions Network
- Deliver Coaching & Training
- ... Change Readiness
- ...ve Resistance

04 NORMALIZE
- Obtain End –user Feedback
- Track & Measure Adoption/Usage
- Provide Additional Training & Support
- Resolve Adoption Roadblocks

05 EXIT
- Conduct/Provide Lessons Learned
- Develop a Transition Plan
- Recognize/Celebrate Quick Wins and Successes
- Transfer Ownership of the Change

Normalize | Exit

Nov | Dec

CHANGE DELIVERY *playbook*

The following slides provide a shell to help you articulate what, when, why, and how you will deliver your change.

about this PLAYBOOK

This playbook was designed to help you articulate what, when, why, and how you will deliver your change.

The following slides are designed to be edited by YOU and used as your own change delivery playbook.

You should add additional information/slides, and tailor the formatting and level of detail of each section to meet the needs of your project.

USES

- For sharing and socializing with project team members, sponsors and stakeholders for feedback and buy-in on change management activities

- To introduce the OCM team / working group

- To outline your OCM objectives and scope for the initiative

- To familiarize stakeholders on the benefits of a well-structured change management process

- To outline and socialize your change management strategies and plans for:

  - Communicating with stakeholders, business units, and impacted employees

  - Engaging with stakeholders, business units, and impacted employees

  - Developing and implementing training

  - And many more...

CONTENTS

UNDERSTANDING THE CHANGE

Sample slides to help you articulate the change.

SUMMARY

The Project
Provide a brief overview of the project/
program/initiative. What is it ? What is it about?

What is Changing?
What solutions will be implemented that will
resolve the problem statement? What are the
objectives? Intended outcomes?

Problem Statement / Issues
At a high-level, describe the issues the
project/program/initiative is intended to
resolve.

What is the Value?
Describe the value the solution(s) will bring to
your organization. i.e., Cost savings? Improved
business continuity? Etc.

WHAT WILL PEOPLE HAVE TO DO DIFFERENTLY?

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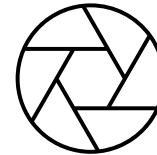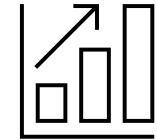
WHAT DOES SUCCESS LOOK LIKE?
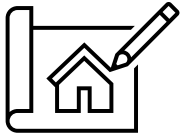
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Measurable metrics are preferred. How many/how much – where possible aim for tangible evidence of success

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How will you know if you have succeeded? Have a VERY clear idea what success looks like. How will you measure it? Visualize what the sponsor/agency leader would be presenting about your project on a "one page"

TIMELINES

WHEN ARE YOU GETTING STUFF DONE?

Include a timeline or graphical depiction of the project /change over time, showing significant project milestones, change activities, and other significant events.

PROJECT ROADMAP

GO-NO-GO

LAUNCH

HYPERCARE

| JAN | FEB | MAR | APR | MAY | JUN | JUL |

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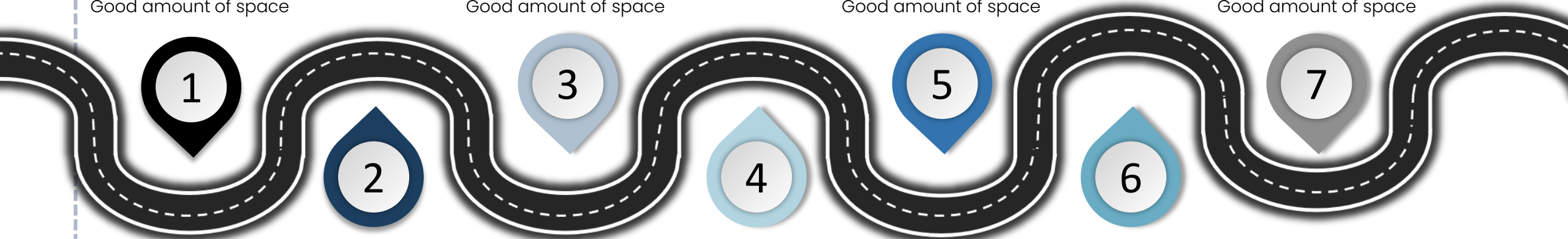
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3

5

7

2

4

6

We are Here

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CHANGE ACTIVITY TIMELINE

PLAN/DISCOVER
Work with business stakeholders to understand change impact, assess and design delivery plans.

FIND CHAMPIONS
Recruit Change Champions as pilot group and delivery advocates/points of contact/accountability.

LAUNCH
Launch virtual roadshow, town halls, communications, etc.

TBD | TBD | TBD | TBD | TBD | TBD

ANNOUNCE
Communicate details of the change so people know it is coming.

PREPARE
Deliver training sessions. Roll-out webinars and/or drop in sessions.

EMBED
Drive adoption with success stories, follow up interviews with key users; pulse check, quarterly comms/ scenarios, ongoing training, etc.
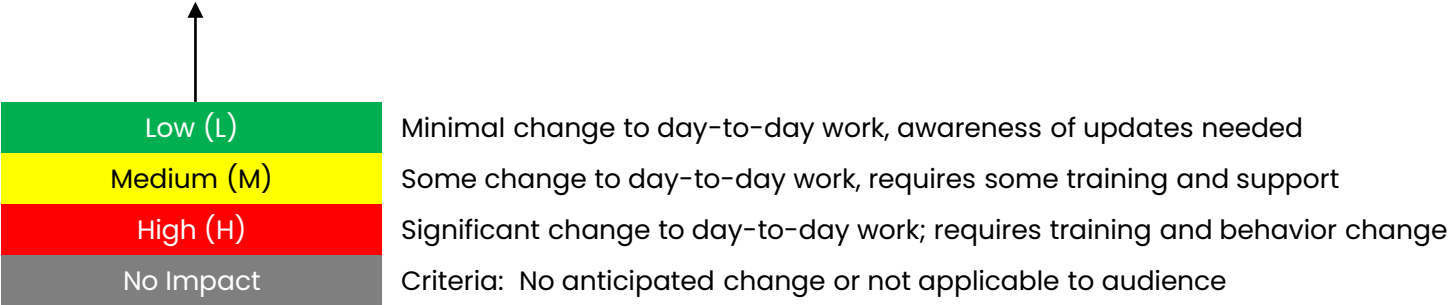
ARTICULATING WHO IT IMPACTS

Detail everyone who is impacted by this change. What is changing? People, Processes, technology, structure? How will it affect each person/group?
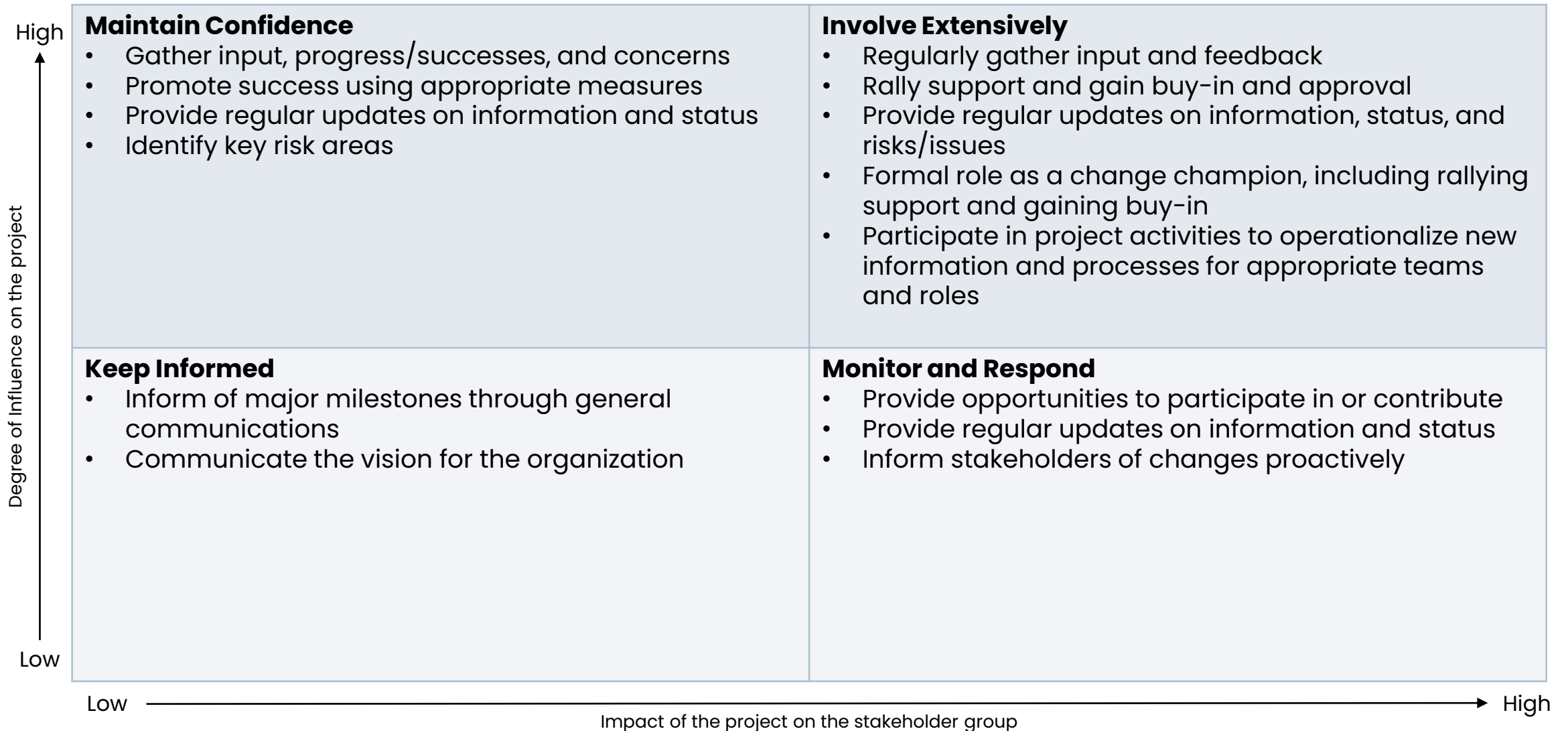
WHO IS IMPACTED?

Group/Area/Individual	Impact description	Degree of impact	Perception/Reaction	Benefits, concerns, or risks	Action

Low (L)	Minimal change to day-to-day work, awareness of updates needed
Medium (M)	Some change to day-to-day work, requires some training and support
High (H)	Significant change to day-to-day work; requires training and behavior change
No Impact	Criteria: No anticipated change or not applicable to audience

STAKEHOLDER ASSESSMENT SUMMARY

This slide is an example of an Impact/Influence framework you can use to analyze your stakeholder groups

Degree of Influence on the project

High

Maintain Confidence
- Gather input, progress/successes, and concerns
- Promote success using appropriate measures
- Provide regular updates on information and status
- Identify key risk areas

Involve Extensively
- Regularly gather input and feedback
- Rally support and gain buy-in and approval
- Provide regular updates on information, status, and risks/issues
- Formal role as a change champion, including rallying support and gaining buy-in
- Participate in project activities to operationalize new information and processes for appropriate teams and roles

Keep Informed
- Inform of major milestones through general communications
- Communicate the vision for the organization

Monitor and Respond
- Provide opportunities to participate in or contribute
- Provide regular updates on information and status
- Inform stakeholders of changes proactively

Low

Low ——————————————————————→ High

Impact of the project on the stakeholder group

STAKEHOLDER INTERVIEWS KEY THEMES

- Loss of clear singular priority: stressed balancing Operations with Integration and worry about real-world impacts

- Resourcing ambiguity/training timelines creating significant worry about attrition and being left supporting Operations without the knowledge or people

- Change-fatigued and "it's only the beginning" of integration. Execs pushing "hurry up"

- Desire for more communication: give us the what, why, when & how it affects me

- 'Adopt & Go' approach creating feelings of "us vs them" and loss of best or newer/innovative practices. (Hard to know how prevalent it is)

- Change happens a lot, it is part of the industry, we are used to it but we don't manage it well. (Many have been through multiple mergers)

- Perception of integration being chaotic: lack of information, changing dates, mixed messaging, inconsistent leadership appearances feels disjointed

This slide is an example of a key findings slide from a Stakeholder Assessment

COMMUNICATIONS & ENGAGEMENT APPROACH

Describe how you will keep all relevant parties aware and informed about any changes that will affect them and how they will be engaged throughout the project.

COMMUNICATIONS PREPARATION

Be sure to answer these questions to help you develop your communications and engagement plans:

Messaging	Context	Sender	Receiver	Channel/Medium	Feedback
• What is the change? • What is the purpose of the change? • Why now? • What is the risk of not changing? • What will the organization need to implement and sustain the change? • What can we communicate before, during and after the change? • What are the key point that need to be communicated? • How often will communications be repeated? What is the timeline?	• What other internal and external factors should we consider when thinking about the change and the delivery of communications? • Are there any events or key dates we should plan around?	• Who will deliver communications about the change? • What communications will come from leaders? From managers? From change sponsors? • How will we empower the communicators to deliver communications and have the necessary conversations?	• Who will be impacted by the change and how? • What's in it for employees? How will they benefit from the change? • What's not in it for employees? How will they be negatively affected? • How can you tailor your message and communications for the different audiences within the organization?	• What channels/ mediums will we use to communicate and engage? (One-on-ones, newsletters, presentations, lunch and learns, Q&A forums, onsite signage, etc.) • What face-to-face communication will be used?	• How will we involve employees or seek input from them during the change process? • What opportunity will there be for two-way communication throughout the change? • How will we evaluate whether we successfully communicated the change?

HOW WILL YOU COMMUNICATE & ENGAGE?
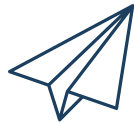
Communication/Event/Action	Frequency	Timing/Date(s)	Sender	Receiver/Audience	Channel/Medium

STAKEHOLDER ENGAGEMENT APPROACH

Include a slide that outlines a stakeholder engagement approach, including Change Champion Network Activities or any other engagement activities planned

Group	Owner	Current Engagement Level	Target Engagement Level	Engagement Approach

TRAINING APPROACH

The purpose of training is to ensure that all stakeholders have the appropriate skills and knowledge to adapt to changes caused by the project.

TRAINING PREPARATION

Deliverable or Activity	Description	Owner	Timing
Training Needs Assessment	Analysis of stakeholder groups and training needs	OCM	
Training Plan	Detailed document outlining training principles, content needed, owners, and timing	OCM	
Tracking and Execution of Plan	Management of the training plan and execution	PM	
Training Materials	Content for training, including videos, Quick Reference Guides, and User Guides	Training Vendor and L&D	
Training Delivery	Teaching courses and ensuring delivery of digital materials	L&D	

TRAINING FOR USER GROUPS

|	Group Name	Group Name	Group Name	Group Name	Group Name
Impacted Users	125	145	500	04	12
Detail	Talk at a high level what this means for this group. What do they do differently and how often?	Talk at a high level what this means for this group. What do they do differently and how often?	Talk at a high level what this means for this group. What do they do differently and how often?	Talk at a high level what this means for this group. What do they do differently and how often?	Talk at a high level what this means for this group. What do they do differently and how often?
Desired Approach	Explain what training is recommended for this group. Webinar, instructor led. Should they watch the video, have follow up coaching?	Explain what training is recommended for this group. Webinar, instructor led. Should they watch the video, have follow up coaching?	Explain what training is recommended for this group. Webinar, instructor led. Should they watch the video, have follow up coaching?	Explain what training is recommended for this group. Webinar, instructor led. Should they watch the video, have follow up coaching?	Explain what training is recommended for this group. Webinar, instructor led. Should they watch the video, have follow up coaching?

TRAINING APPROACH – HOW WILL WE TRAIN?
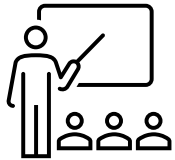
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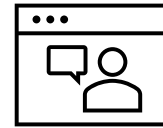
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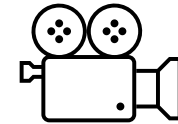
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If there is to be training how will it look? Who will deliver it, and what and when will they deliver it? Give a high-level outline of how training will be delivered in your project. Training may be delivered by outsourced providers, or by SME's. Detail it here.
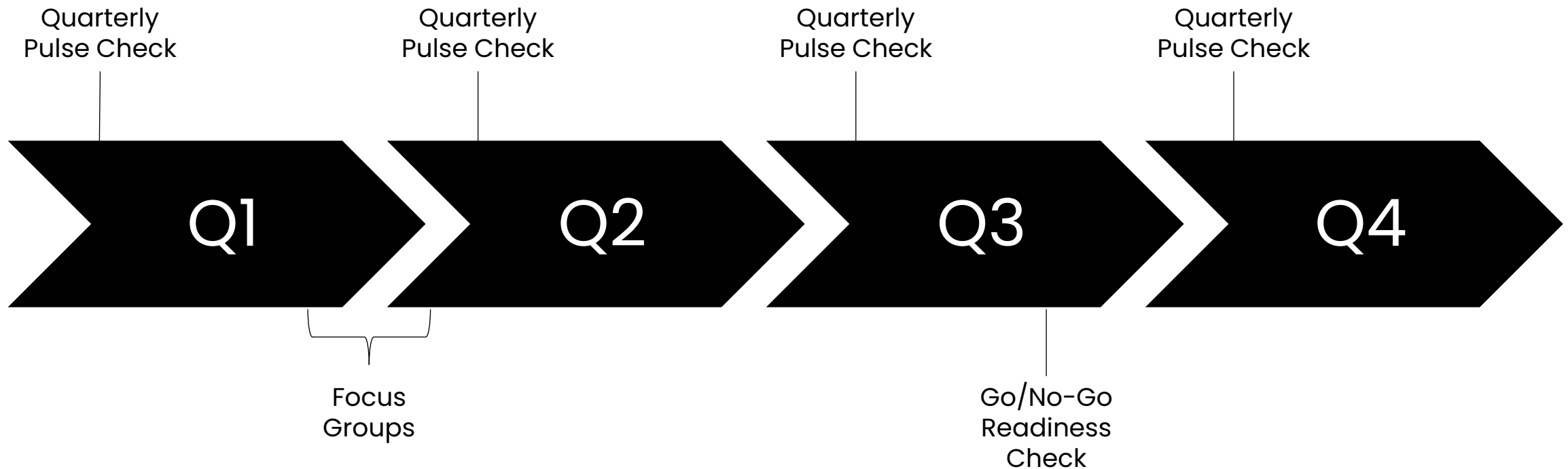
WHEN WILL WE TRAIN?

Course Offerings	February	March	April	May
Course #1	Feb 22, 8 AM – noon	Mar 30, 8 AM – noon		
Course #1	Feb 9, 1 – 2:30 PM	Mar 29, 8:30 – 10 AM	Apr 26, 8:30 – 10 AM	May 24, 8:30 – 10 AM
Course #1	Feb 10, 1 – 2:30 PM	Mar 10, 1 – 2:30 PM	Apr 14, 1 – 2:30 PM	May 12, 1 – 2:30 PM
Course #1	Feb 16, 1 – 2:30 PM	Mar 3, 1 – 2:30 PM	Apr 7, 1 – 2:30 PM	
Course #1	Feb 17, 1 – 2:30 PM	Mar 17, 1 – 2:30 PM	Apr 21, 1 – 2:30 PM	May 19, 1 – 2:30 PM
Course #1		Mar 1, 9 – 10:30 AM	Apr 5, 9 – 10:30 AM	May 3, 9 – 10:30 AM
Course #1		Mar 22, 8:30 – 10 AM	Apr 27, 1 – 2:30 PM	May 26, 1 – 2:30 PM

READINESS APPROACH

Include a slide that will outline the plan for readiness assessments, including Pulse Checks, interviews, and focus groups, etc.

READINESS ASSESSMENT APPROACH

Quarterly
Pulse Check

Quarterly
Pulse Check

Quarterly
Pulse Check

Quarterly
Pulse Check

Q1

Q2

Q3

Q4

Focus
Groups

Go/No-Go
Readiness
Check

- **Quarterly Pulse Check:** 5-question survey to check in on basic readiness factors
- **Focus Groups:** Discussions with stakeholder groups that take an in-depth look at specific readiness factors
- **Go / No-Go Readiness Check:** Check-in on established Go/No-Go readiness criteria

GET STARTED WITH A READINESS CHECKLIST

Using insights from employees, we've created a comprehensive readiness program that involves a variety of methods and touchpoints.

Our goal is to provide you with the right tools and resources at the right time to help you learn and at a pace that works for you.

Use the readiness checklist to get a sense of the big picture and take steps to orient yourself to the new <insert change.

First

Second

Third

Fourth

Fifth
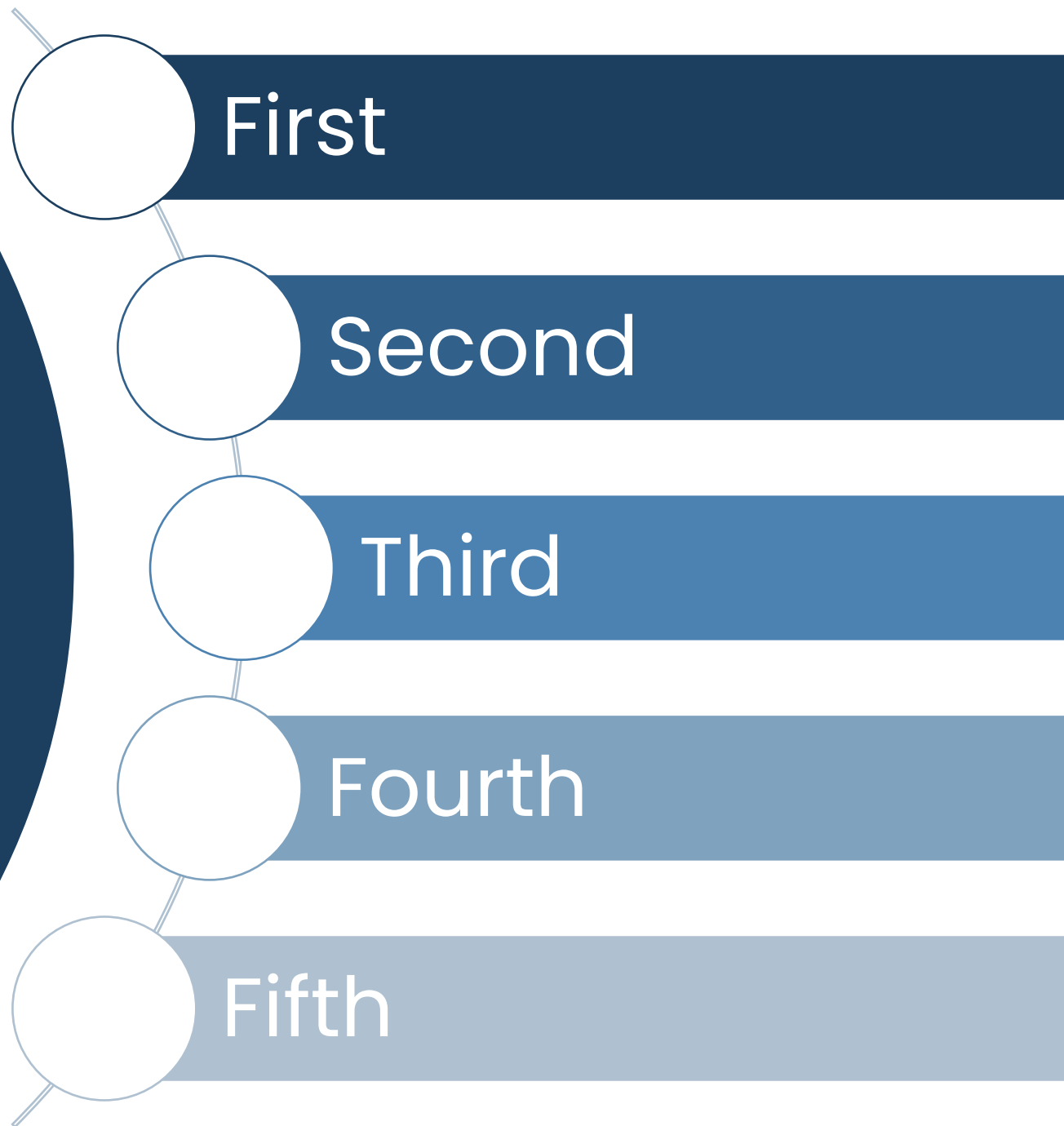
SUPPORT & SUSTAINMENT APPROACH

Include a slide detailing the support and sustainment approach for the project; depending on the timeline of the project, this slide could be very high level or more detailed.

SUPPORT & SUSTAINMENT APPROACH

Support and Sustainment is the OCM strategy for supporting stakeholders while the change is taking place and assessing and managing the success of the change after it has happened.

For <Project>, the support and sustainment plan could include:

- Help Desk Hypercare Post-Go-Live
- Competency and Adoption Assessments
- Training "Follow-Up" Sessions
- SMEs Onsite

The OCM Team will provide a more detailed Support and Sustainment plan by Q2 2023.