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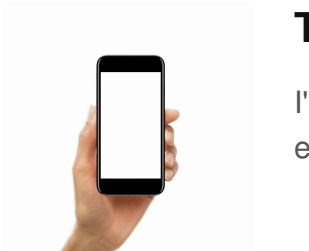
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## Are you new to Project Management?

One of the key concepts in this blog is Project Scope Management. [Learn More](#) about this concept.



## Talk to Me!

I'm glad to discuss your transformation effort! Reply to this email to schedule a free 1 hour consultation.

## Implementing Transformation

*Understanding these essential best practices for leading a transformation will position you for success in your change journey.*

I realized these implementation best practices through my experience in a Global Payroll Transformation. Briefly, this business had acquired several small

to medium sized companies around the world over a period of several years. The CFO was particularly concerned about Payroll as each acquired company had unique payroll processes, systems and personnel in each country. There was considerable risk if key payroll personnel would leave the company, including inaccurate payroll, poor benefit provisioning or a failure to meet legal requirements. Any of these could jeopardize the company's ability to retain essential employees and deliver on customer commitments.

To reduce risk, company leadership decided to select a partner to provide a global Payroll solution through technology, a provider network or both. Several global Payroll providers and technology solutions were evaluated and ultimately a SAAS partner with a global network was selected. If you are interested, read this [Global Payroll Transformation Case Study](#) .

### **Doesn't the solution partner lead implementation?**

I've experienced many new solution implementations for Finance, Payroll and Human Resources. Finding a good partner that follows through on their commitments is like finding gold! The best partners do a great job of getting their solutions up and running, others may not execute so well. However, even with the best of partners, you need an internal transformation leader who is going to ensure the solution is successfully integrated into the company's business environment. This global Payroll Transformation was no different. While the implementation planning, solution configuration, testing and release was all led by the partner, the transformation leader drove business process and system integration of the solution across the company.

### **Understand the impact of transformation**

The transformation leader needs to develop a clear understanding of the current state, the future state, impacted organizations and key changes that can be expected for major business processes and systems. This exercise is critical for understanding what work is required and the key integration points for internal and external partners. For this Payroll Transformation, we used a simple Excel worksheet to capture information about the changes and confirm that all the work was incorporated into the project plan. This helped us identify and address all the upstream and downstream dependencies with other organizations. By managing these integration points, we optimized the solution configuration and avoided implementation surprises and business interruptions.

See a sample [Change Assessment](#) (below Case Study) and contact me if you want the Excel template.

### **Build a team capable of executing**

One of the greatest challenges with transformation is that the teams you have in place today have been hired, trained and become successful at maintaining the current solution. Often, the processes and systems have been in place for years, or perhaps decades and team members don't understand the:

- \* underlying data structure
- \* system's data flows
- \* system's processing logic

Some individuals on the team will be capable of investigating how the existing system is structured to make configuration decisions in the new solution, while others on the team will not have the skills to do this. Select people for SME lead roles that are capable of this work and are excited about moving to a new solution. Your internal technology teams are also great resources during a transformation.

However, in my experience and certainly in this Payroll Transformation, external experts needed to be hired. We looked for experts that had multiple transformation experiences with the specific Payroll solution we were implementing. These experts brought invaluable knowledge, templates and tools to guide the team in making the best process, data and configuration decisions.

External experts accelerated our transformation.

### **Lead the change process**

One of the most important outcomes of conducting the change assessment is a clear understanding of how this transformation will impact different employee populations. Employees resist and struggle with change when they:

- \* don't know that change is coming (lack of communication)
- \* are directed incorrectly (outdated online content)
- \* don't know how to do things differently (insufficient training)
- \* perceive that it's just too confusing (poor user experience, support, FAQs)

The transformation leader needs to drive work in these areas to ensure employees are able to adopt the solution. After building out the change assessment in this Payroll Transformation, we assigned a dedicated resource to capture materials from the Payroll solution partner and from internal organizations to update the company portal, develop FAQs for employees, create training vignettes and build out presentation decks. All communication and training efforts leveraged these materials to ensure employees were informed about what they needed to do differently when the solution was released.

## Hold the solution partner accountable

Finally, the transformation leader needs to understand the solution provider contract and hold them accountable to their commitments to ensure the company gets the quality solution they paid for. If you have a good partner, this part of the job isn't too difficult. If you don't have a good partner, you will spend a lot of time negotiating work, managing rework and conducting escalations. Find a good partner!

Engaging a transformation leader with a strong project management approach, effective leadership skills, and an understanding of transformation best practices provides your company with the best opportunity for success. No significant transformation effort is executed flawlessly but we learn from our experience, improve our approach and hopefully share those insights with others along the way.

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### *About Annette*

*Annette is a business transformation coach working with executives to create more effective operations and greater business value. Both vision and execution are key to motivate people to transform work. She guides leaders to develop transformation vision and strategy, structure implementation projects and roadmaps, and she mentors project teams to be successful. She also shares tips, resources and leading practices as a PM mentor and through her Transformation Tips blog.*



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