

About this deck

- A mid-size company was experiencing rapid growth through multiple acquisitions.
- I was brought in to build organizational change management strategy, capacity, and capabilities so the company would succeed with business integration.
- I completed an organizational change management maturity assessment and created a roadmap to help them quickly establish essential OCM capabilities to support growth.
- This deck is a presentation I made to the Executive Leadership Team presenting the assessment and roadmap.
- Appendix includes tools and supporting information.



Agenda

TOPICS	SLIDES
Executive Summary	3
Why are we here? Grounding us in the foundation established by CTO / BTO	4-5
Current State Organizational Change Management (OCM) Capability Audit	6
4-Year Plan Elevating our brand by maturing OCM	7
Capability Area 1 – Leadership Elevating leadership voice	8
Capability Area 2 – Application Sequencing and deploying change	9
Capability Area 3 – Competency Building and deploying role-based training	10
Capability Area 4 – Standardization Focus, PCT, ADKAR	11-13
Capability Area 5 – Socialization Expand ways to connect, align and engage	14
Immediate Next steps – Rapid training deployment and set up toolkit	15
Questions & Discussion	16
Appendices (additional resources and support)	

Executive Summary

Inputs

- One-on-ones w/ 45 senior leaders, GMs, managers and employees
- Dept / integration changes - reviewed high-level needs
- Assessed strategy and function (Kotter Readiness and Prosci Maturity Model)

Key learnings and observations

- Positive energy about company future
- Ambiguity and mixed messaging
- High uncertainty
- Pockets of frustration, resistance and low trust
- Areas of fear and disruption
- Resistance is strong at the leadership and mid-management levels as a certain level of competition exists
- Many cultures, silos emerging as functions and entities work to preserve their identities
- People feel that information is not consistently cascading

What's next – training to increase awareness, understanding and ability

- Build trust among senior leadership team; build transformation leadership and engage in shaping change
- Embed change process into project management
- Build change capabilities - Role-based training for three groups:
 - Leaders and people managers
 - Project managers
 - Employees



OCM Maturity Audit Ratings by Capabilities

Access complete Prosci Maturity Audit [here](#).

Leadership – Score 2

Leaders as sponsors actively and visibly communicate, influence and engage people in change.

Application – Score 1

OCM standards applied across multiple projects and initiatives.

Competency – Score 1.2

All doers of change management (sponsors, managers, employees, PMs, CMs, and tech managers know and consistently demonstrate change management principals.

Standardization – Score 1.1

Common OCM vision, approach, process and language. OCM integrated with PM, fixed component to produce change. Triggers identified.

Socialization – Score 2.3

Buy-in, commitment and engagement in building capability and driving change is pervasive. Change management takes change management.



Transformation Capability Roadmap



Leadership - Elevate Leader Voice

Enable leaders to help employees make meaning of change and engage.



Align and articulate change vision and urgency for senior leaders communicate

Senior Leaders



Mobilize and engage GM council for buy-in, support and feedback.
Identify and mobilize change leaders for CoE

GMs, Functional Leaders



Train and enable sponsors and people managers to lead their people through change

People managers



Application - Sequence & Communicate



- Calibrate change roll-outs to:
 - Promote continuity
 - Mitigate change fatigue
 - Minimize disruption
 - Leverage interdependencies
- Calibrate changes at site level to ensure operations
- Create cadence for reports to:
 - Maintain focus on vision & urgency
 - Focus on & promote accountability for shared goals
 - Manage uncertainty
- Celebrate and highlight successes



Competency – OCM is a Team Sport

*We are training for all roles in 3 learning paths
(Leaders, GMs, People Managers; Project & Change Managers; People)*

Type	Core Role	Accountabilities
Employee-Facing Roles	Sponsors	ABCs - Promotes adoption and use by A ctively and visibly participating, B uilding coalitions, C ommunicating directly
	People Managers	CLARK – Ensures adoption as a C ommunicator, L iaison, A dvocate, R esistance M anager and C oach
	People	Engage, adopt and use the change
Enabling Roles	Change Manager	Prepares, equips and supports people with integrated strategies and plans, assessing risk, consulting project team on solution
	Project Manager	Prepares the solution for delivery on time and budget designing a solution with adoption and usage in mind integrating inputs from the people-side-of-change

Standardization - Focus on Project and Change

Project Management

Requirements

Outputs

Specifications

Installation

The People Side of Change

Change Management

Results

Outcomes

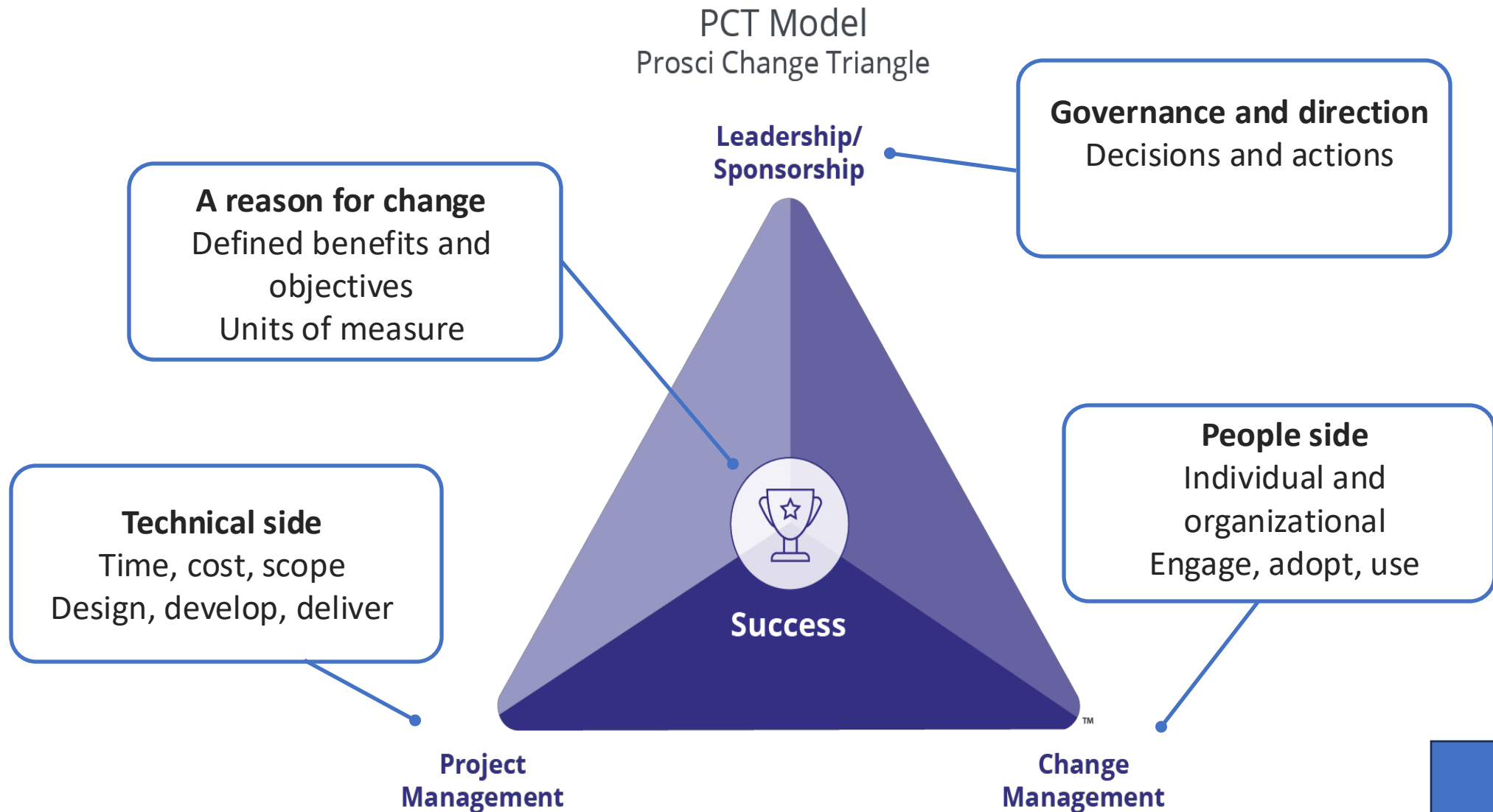
Sustainment

Realization*

*The Leader's Challenge: Installation or Realization, Conner Partners, 2004



Standardization – PCT Model to Prepare for Success



* Assess project “health” at kick off [with this tool](#)

Standardization - ADKAR on a page

ADKAR operationalizes the process of moving people from awareness to action.

	ADKAR element:	Definition:	What you hear:	Triggers for building:
A	Awareness	Of the need for change	"I understand why..."	Why? Why now? What if we don't?
D	Desire	To participate and support the change	"I have decided to..."	WIIFM Personal motivators Organizational motivators
K	Knowledge	On how to change	"I know how to..."	Within context (after A&D) Need to know <i>during</i> Need to know <i>after</i>
A	Ability	To implement required skills and behaviors	"I am able to..."	Size of the K-A Gaps Barriers/Capacity Practice/Coaching
R	Reinforcement	To sustain the change	"I will continue to..."	Mechanism Measurement Sustaining

Socialization – Expand Ways to Align & Engage



“Top-down change is disconnected from today’s workflow, and it’s slowing organizations down.”
– *An Open-Source Approach to Change*, Gartner, 2019

Pilot *Pseudo* Open-Source Change

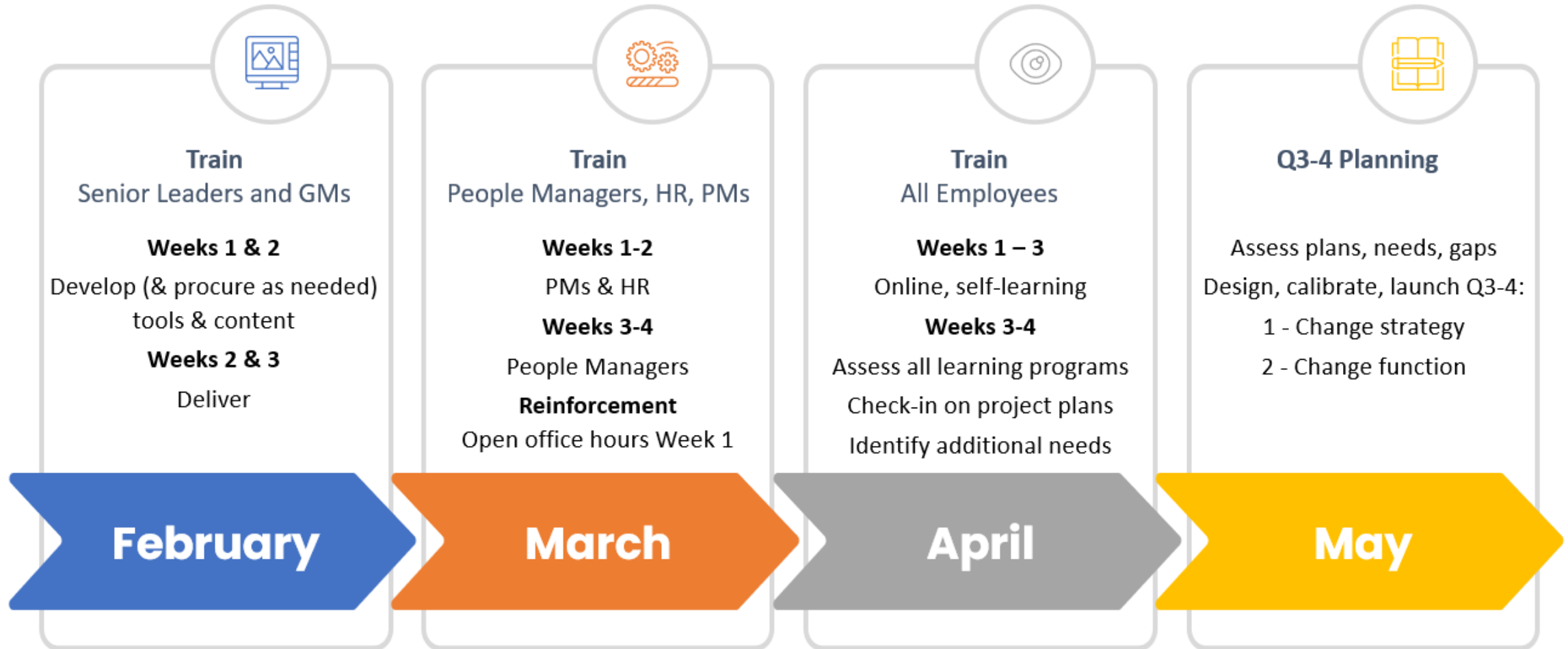
What it looks like

- Dialogue between business and process owners
- Feedback on solution
- Feedback and engagement in rolling out change

Open-source change can

- ⬆ Increase success 34% to 58%
- ⬇ Decrease implementation time 33%
- ⬆ Increase employee engagement 38%
- ⬆ Increase intent to stay 46%

What's ahead – mobilize and prepare



- Off-the-shelf and in-house content and delivery methods including self-guided learning on LMS
- Projected investment: \$8,000-10,000



Questions & Discussion



APPENDICES



Apply OCM - Integrate with project process

ADKAR milestones describe individual progress and need to align with the lifecycle of the initiative.



Unfortunate Reality

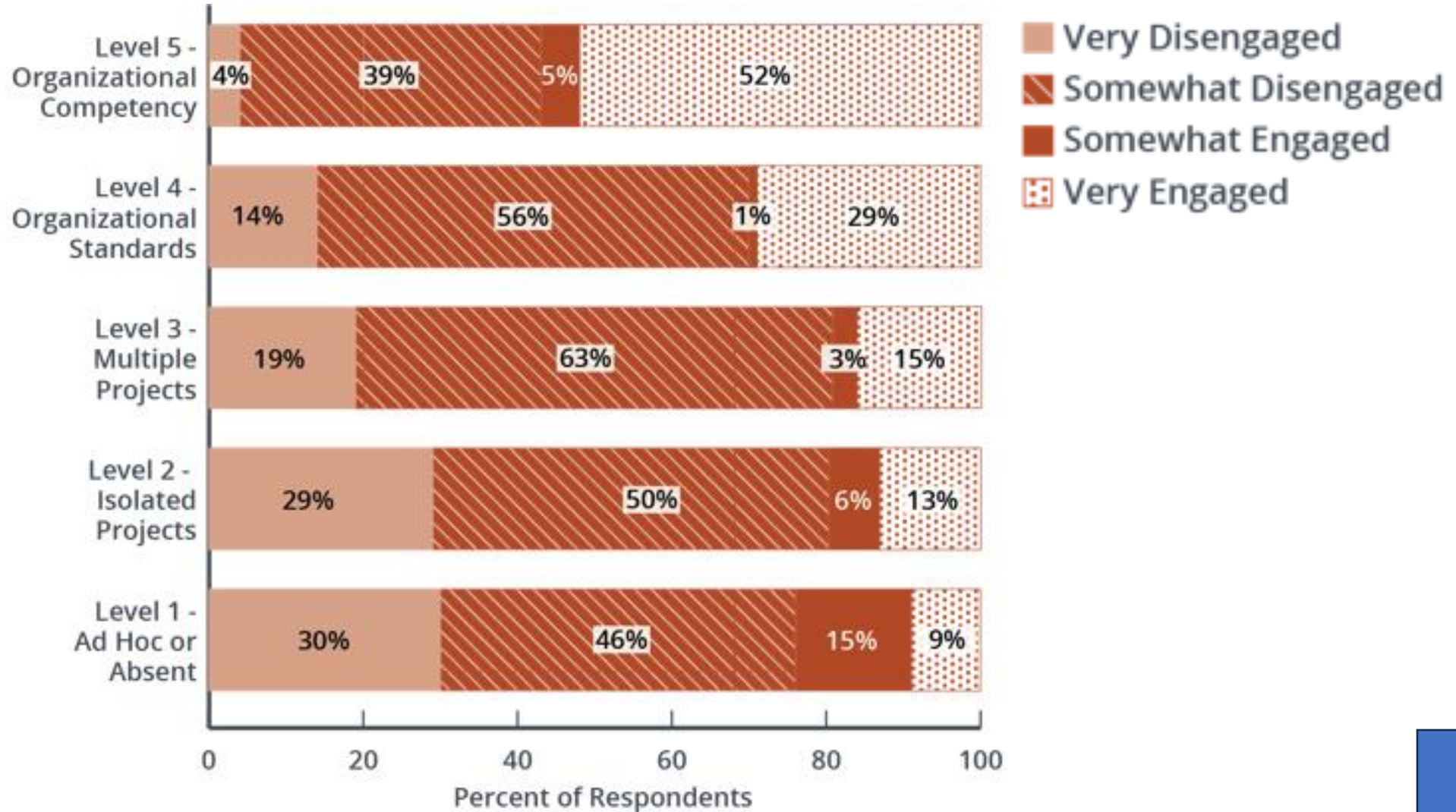


OCM: a critical success factor

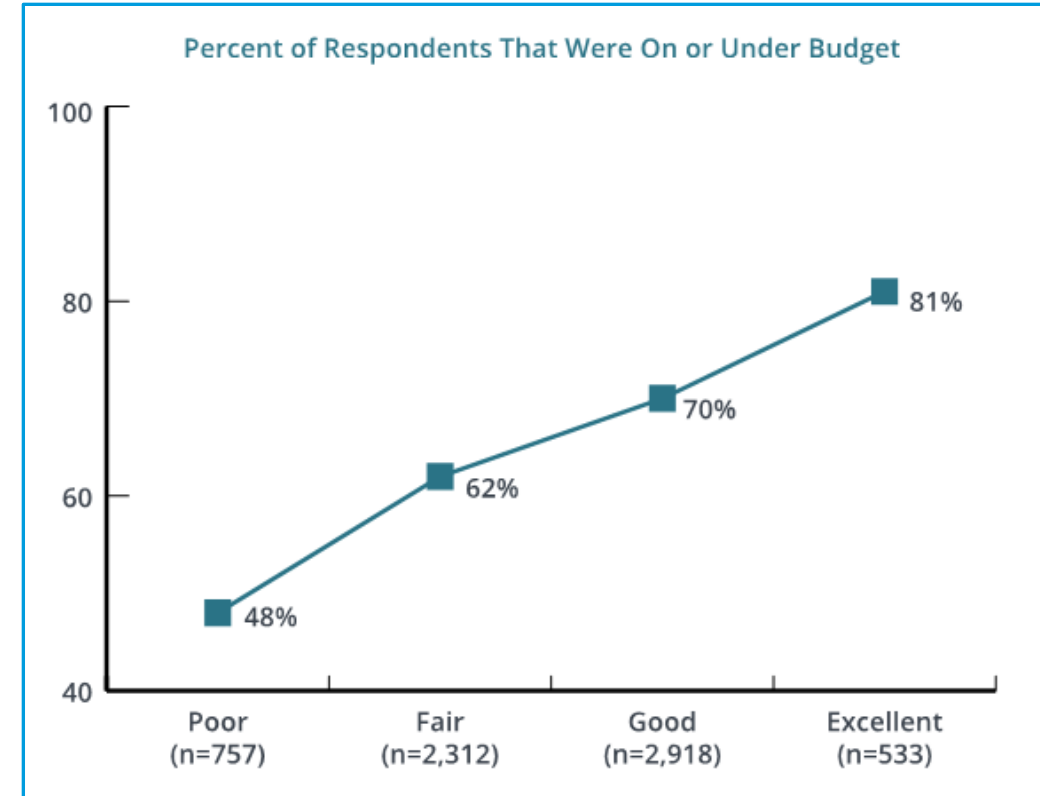
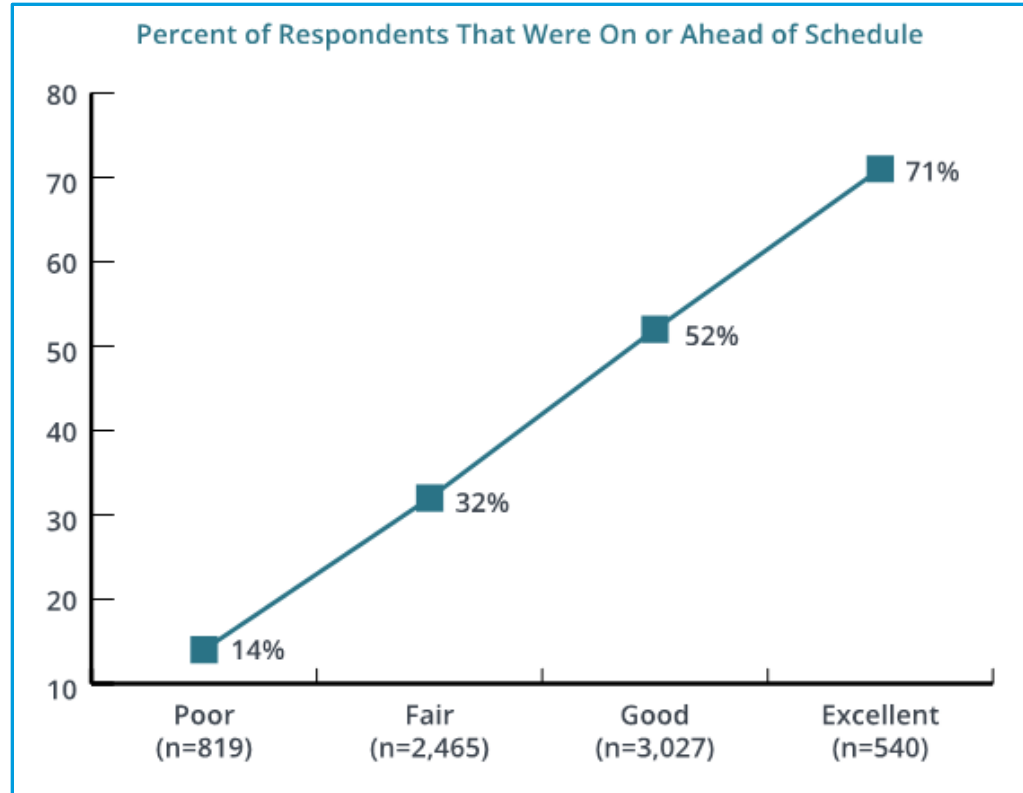
- 70% of M&A fail to achieve intended results (Gartner, 2019)
- 60–70% of all change efforts don't achieve results (McKinsey, '19)
- 90% of change failures are due to people and organization problems that can be prevented with structured change management (Gartner, McKinsey)
- Structured change approach increases likelihood of success by 6X (Prosci)
- Change management maturity drives employee engagement (Prosci)
- Change management maturity drives project success
 - 81% projects on or under budget
 - 71% on or ahead of schedule



OCM maturity drives engagement



OCM maturity drives project outcomes



Prosci 2020 Benchmarking Data from 2007, 2009, 2011, 2013, 2015, 2017, 2019



We identified the factors that differentiate successful from unsuccessful M&As.



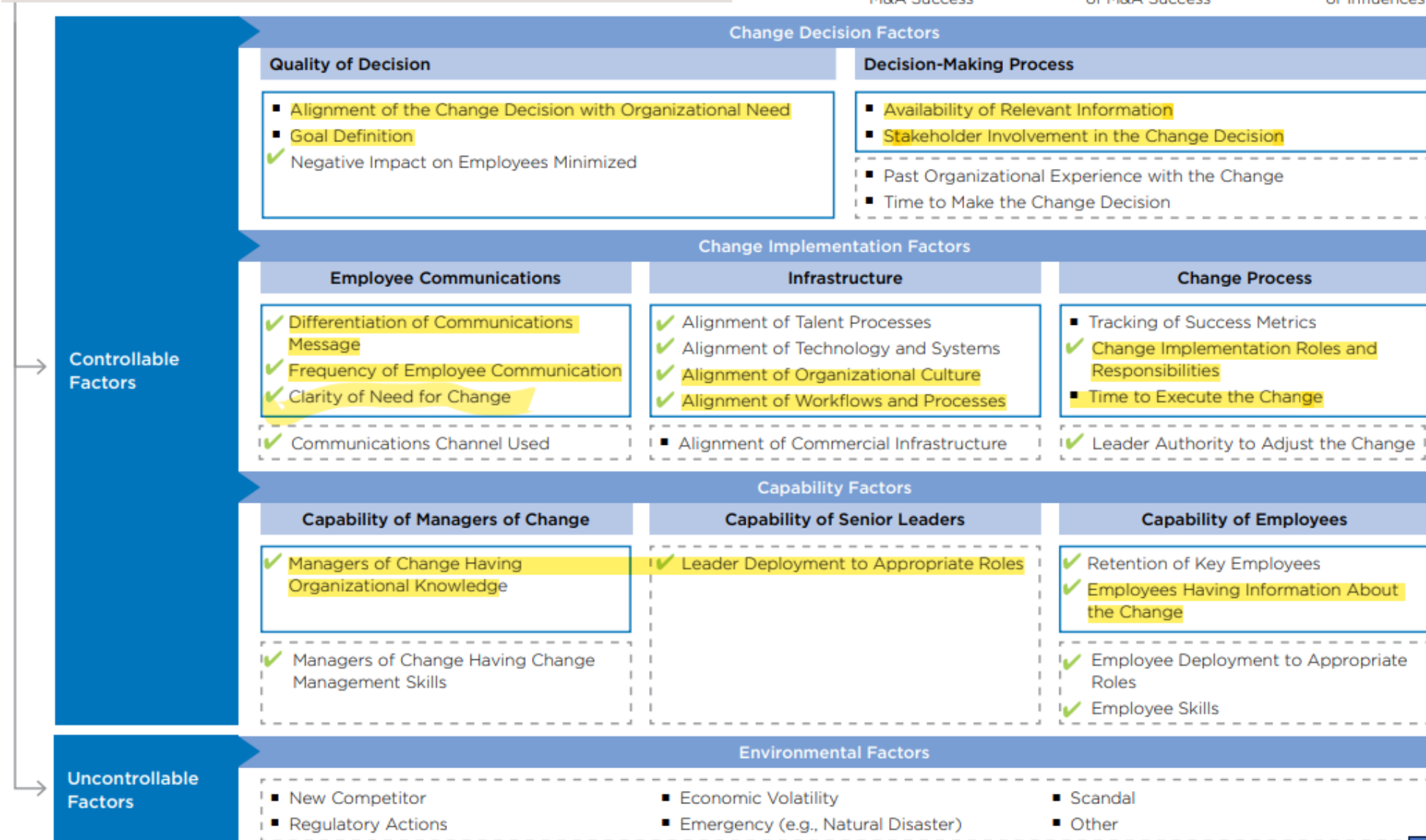
Differentiator of
M&A Success^a



Not a Differentiator
of M&A Success



HR Owns
or Influences



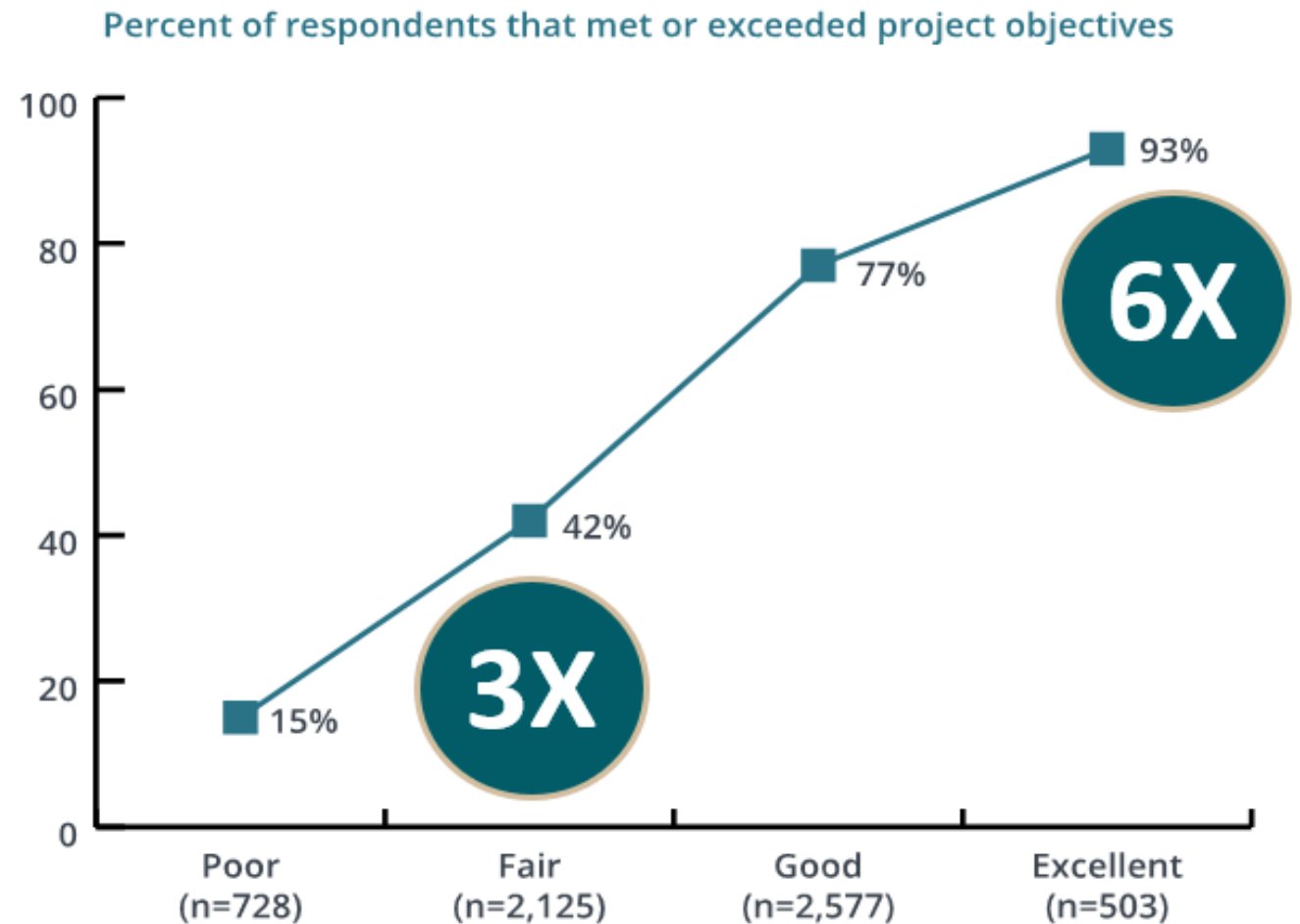
n = 72 mergers and acquisitions.

^a Differentiators of M&A success are identified by calculating the frequency of each organizational factor in the most successful mergers and acquisitions and their frequency in the least successful mergers and acquisitions, then analyzing whether the difference in frequency is statistically significant. Please see the Appendix for more details about how differentiators were calculated.

© 2019 Gartner, Inc. and/or its affiliates. All rights reserved.

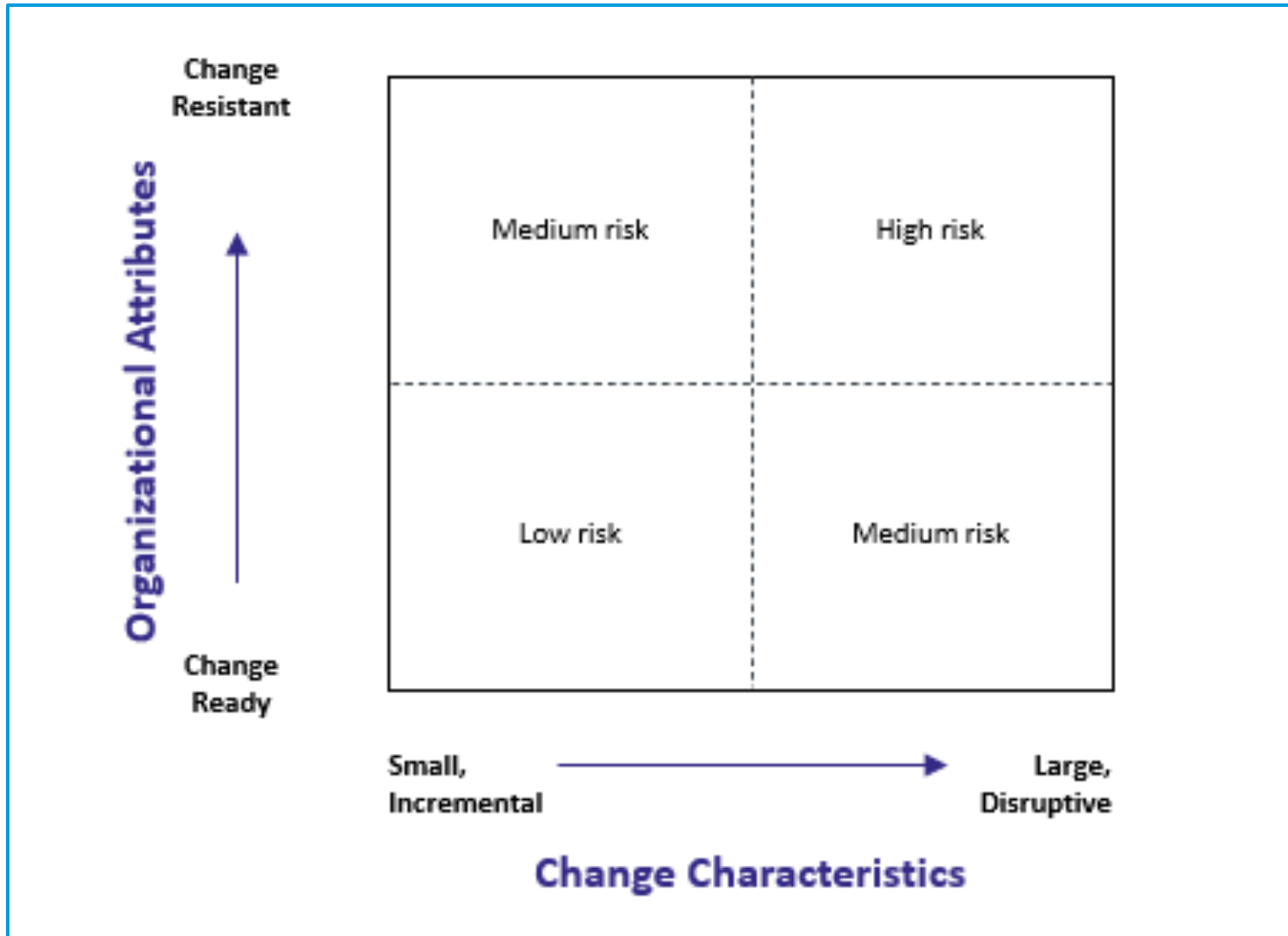
Managing the People Side of Change and Achieving Project Results

The ability to successfully deliver **project objectives** is directly impacted by how effectively we **manage the people side of change**



Prosci 2020 Benchmarking Data from 2007, 2009, 2011, 2013, 2015, 2017, 2019

Risk Assessment



Click image to access the assessment tool



Change Impact Analysis



Click image to access the tool



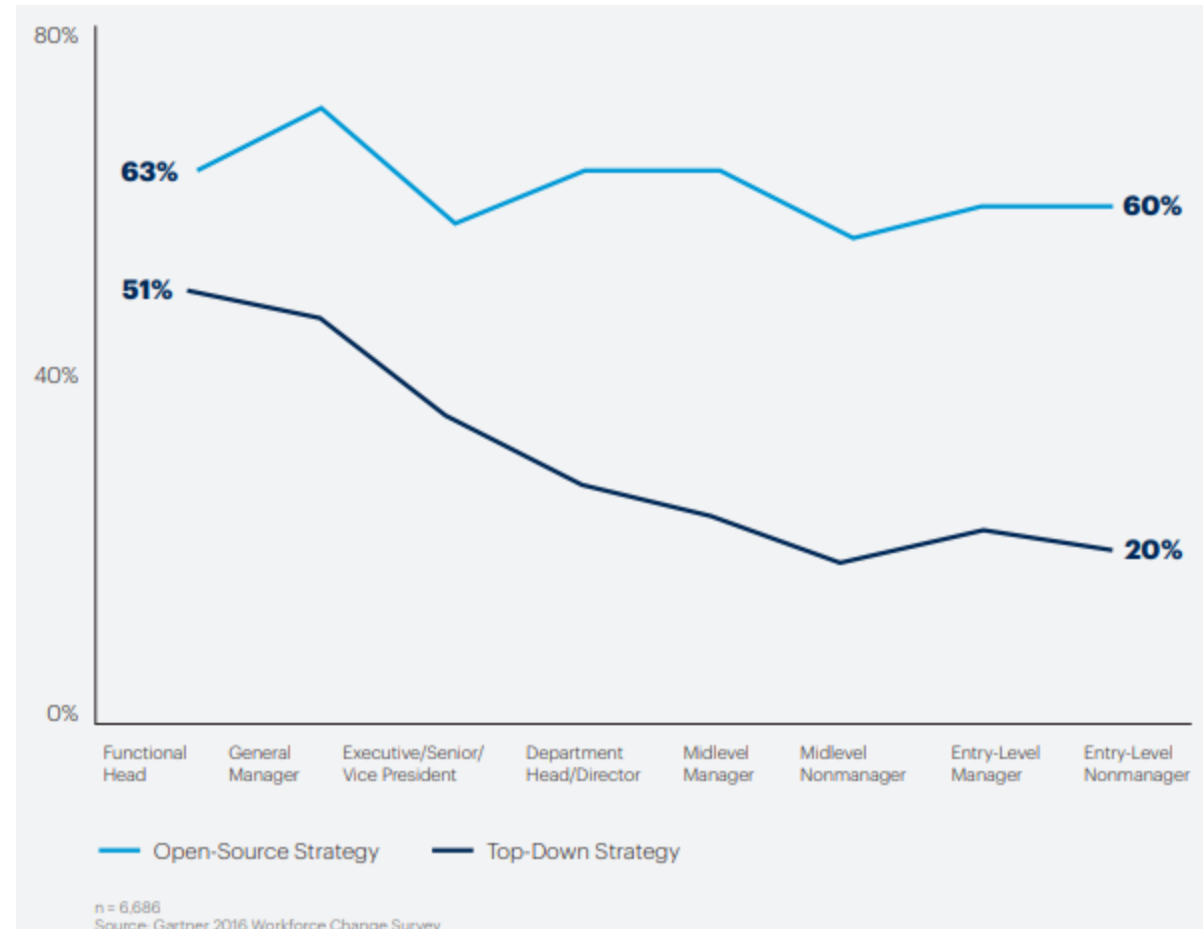
“Top-down change is disconnected from today’s workflow, and it’s slowing organizations down.”

Open Source Change increase
change success 34% to 58%

Implementation time can decrease by 33%

Employee engagement can increase by 38%

Intent to stay can increase by 46%



Gartner, *An Open Source Approach to Change*, 2019



When people change organizations change

*ADKAR model responds directly to people's needs as they go through the change curve.
When done well, uncertainty and disruption is minimized.
Projects achieve adoption and business goals faster.*

