

Pathways

Leading Discovery – Connecting Outcomes

Organizational Agility – Operational Excellence

Driving Value Across Sustainable Incremental Change

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Product Overview - Pathways



Product Overview – Discovery and Outcomes

Pathways Leads Discovery and Connects Outcomes...

- *Begins with assessing the objective realities of where the organization is in its journey from mediocre to exceptional*
- *Sets the stage for articulation and communication of desired future state of exceptional performance, persona and reputation*
- *Connects the organization with corporate enterprise strategy*
- *Connects operations with performance based upon corporate enterprise strategy*
- *Connects individual with operations based upon performance standards*

Product Overview - The Team

Pathways is a Well Orchestrated Mix of People and Process...

- *Senior Leadership and Impacted Organization(s)*
- *First Level Management and Impacted Staff*
- *Independent Skilled OCM Team*
- *A Process and a Privilege*
- *A Set of Means and Measures*
- *Documentation and Determinations*

Product Overview - Definitions

Common understanding begins with common definition...

- **Organizational Change**

- *Focused review and modification of management structures and business processes. Organizations must adapt, adopt and utilize change to assure success.*

- **Organizational Change Management (OCM)**

- *The comprehensive application of a structured process and set of tools for leading the people side of change to achieve a desired outcome such as increased rates of adoption and utilization.*

Product Overview – OCM Support

OCM Support leads and facilitates organizational change brought about by Technology / Information Systems Acquisitions...

- *Such changes safeguard against obsolescence or abandonment of Information throughout their entire acquisition lifecycles*
- *OCM Support also strives to build and support the organization's change capability and capacity*
- *Achieving desired, repeatable results in projects does not come from wishful thinking or hoping luck holds out*
- *Getting consistent, reliable results in any effort, including OCM, requires a proven methodology that is scalable and can be applied along any phase of a project*

Product Overview – Value Proposition

Together, the disciplines of organizational change management and project management present a unified value proposition for achieving successful change...

- *The primary unified value proposition sets the foundation for the tactical integration of organizational change management and project management*
- *The fundamental underlying value proposition lies in reaching a future state on both the technical side and people side of change which realizes intended outcome, such as increased rates of adoption and utilization*
- *However, that is just the beginning of the value proposition, adding...*
 - *Stronger case for organizational change management*
 - *Positive perception of organizational change management by project teams*
 - *Stronger desire of project teams for structure and process*
 - *Deeper problem identification while proposing a solution*
 - *Enhanced organizational change capability and capacity*

Product Overview – Collaborative Results

The federal government should expect to actively and aggressively collaborate with an independent, skilled OCM team to achieve...

- *Articulated and documented paths for change preparation, management/assistance and reinforcement*
- *Articulated and documented change attributes and organizational impacts*
- *Clearly defined roles, responsibilities and relationships*
- *OCM goals and objectives*
- *Integrated project and OCM schedules*
- *Common tools and methodologies*
- *Awareness of the need for change*
- *Desire to participate in change*
- *Knowledge on how to change*
- *Abilities to achieve and sustain change*
- *Reinforcement for sustainable change*
- *Mitigated change resistance*
- *Increased effectiveness of project delivery*
- *Higher rates of change adoption and utilization*
- *Enhanced program return on investment*
- *Enhanced organizational change capability and capacity*

Product Overview – Focus

OCM at the project level focuses on creating the actions required, while, OCM at the individual level, focuses on the outcomes desired and ultimately happens one individual at a time...

Tools or components of OCM include...

- *OCM process*
- *Project Management and OCM Integration*
- *Defining OCM*
- *Readiness assessments*
- *Communications and communication planning*
- *Coaching and manager training for OCM*
- *Knowledge building and resource development*
- *Sponsor activities and sponsor roadmaps*
- *Resistance management*
- *Data collection, feedback analysis and transformational action*
- *Celebrating and recognizing success*

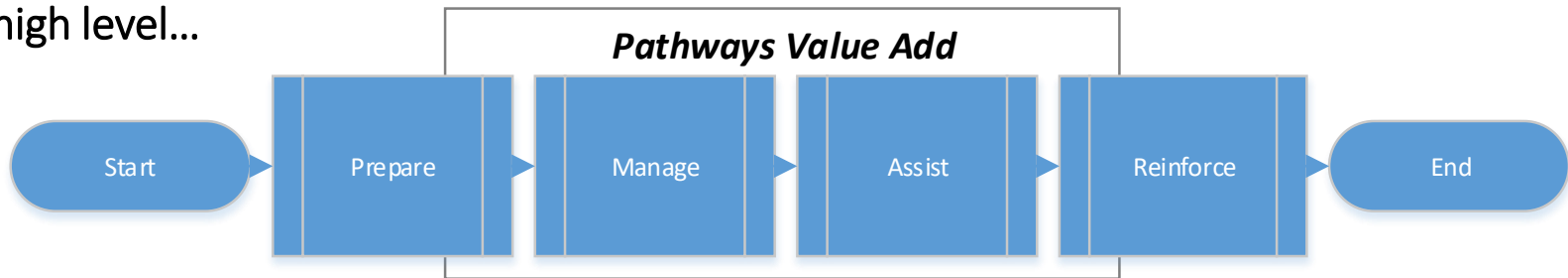
Product Overview - Process

Sustainable incremental change results in valued outcomes and transformation...

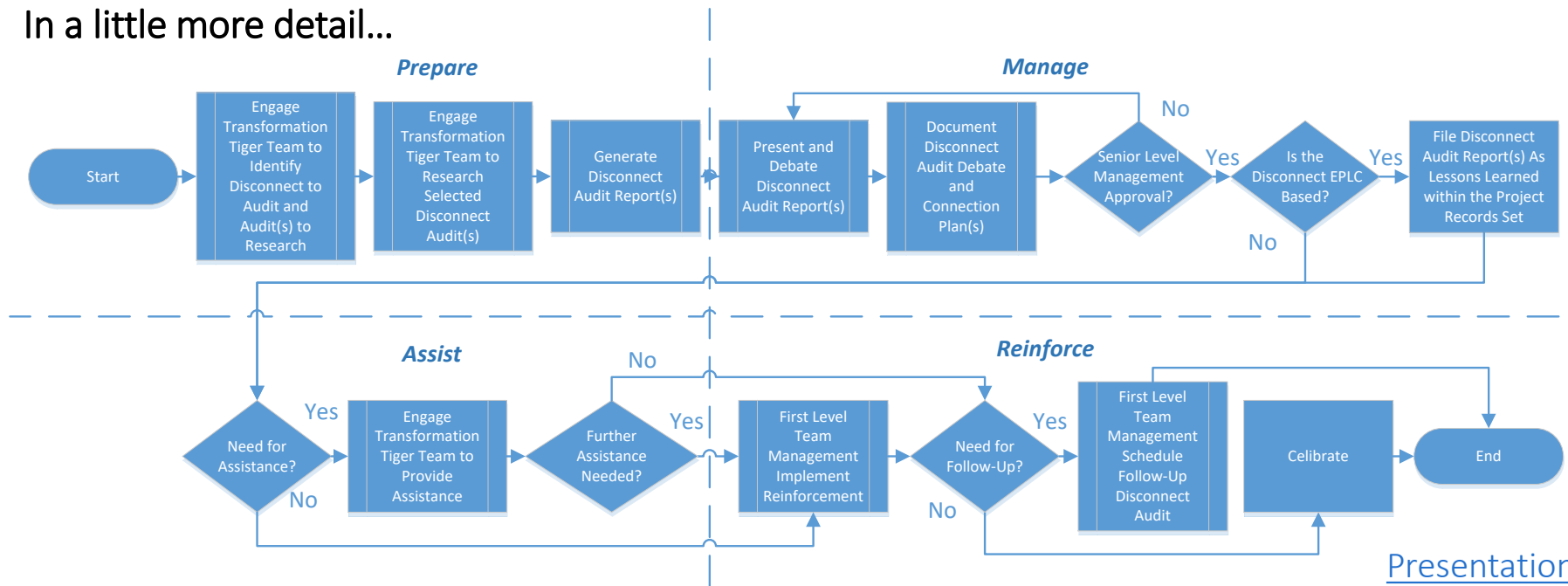
- *Disconnected outcomes do not occur overnight, neither does connecting them occur overnight, and without skilled independent team assistance*
- *Sustainable incremental change drives value in transformation*
- *The process of sustainable incremental change must be fully embraced*
- *Process activities are segmented into three (3) distinct phases of OCM activities; Preparing, Managing/Assisting and Reinforcing Organizational Change*
- *Although each has its unique attributes, process activities are iterative in that they follow the Deming Cycle of Plan, Do, Act and Check. PDAC is applied until all OCM goals and objectives are met for the future state*

Product Overview - Workflow

At a high level...



In a little more detail...



Presentations and Discussions

Product Overview – Skills

The independent skilled OCM Team serves to lead and guide the OCM initiative on its journey from mediocre to exceptional...

- *Federal Tiger Team Management*
- *Organizational Leadership*
- *Transformation Team Management*
- *Operations and Training Leadership*
- *Organization Change Management Leadership*
- *Business Process and Communications Leadership*
- *As Needed, Subject Matter Expertise*

Product Overview – Structure

The change management team structure identifies who will be doing the change management work. It outlines the relationship between the project team and the change management team...

Frequent team structures include...

- *A change manager being embedded into a project team*
- *A centralized change management team supporting a project team*
- *Change management being a responsibility assigned to one of the project team members*
- *The primary sponsor authorizes and champions the change*
- *Additionally, the primary sponsor participates in building a coalition of sponsors across the organization*
- *The sponsor coalition is comprised of the leaders of the groups impacted by the change*
- *Each member of the sponsor coalition has the responsibility to build support and communicate the change with their respective audiences*
- *Sponsor coalition describes the leaders and managers who need to be onboard and actively engaged in leading the change*

Product Overview – Performance

The independent OCM Skilled Team performance is frequently measured against the following key performance indicators...

<u>Function</u>	<u>KPI Description</u>
• OCM and Project Integration	Rate of Assigned Change Adoption and Utilization
• OCM Growth and Continuity	Increase in Impacted Organizational Change Capability and Capacity (With Federal Collaboration)
• OCM Requirements and Team Assemble	Rate of Assigned Change Adoption
• OCM Efforts and Outcomes	Rate of Assigned Change Utilization
• OCM Team Training and Development	Increase in Impacted Organizational Change Capability
• OCM Knowledge Transfer and Assurance	Rate of Assigned Change Adoption and Utilization
• Reinforce and Assure OCM Knowledge Transfer and Continuity	Increase in Impacted Organizational Change Capability and Capacity (With Federal Collaboration)
• OCM Business Process Engineering, Communications and Understanding	Increase in Impacted Organizational Change Capability and Capacity (With Federal Collaboration)
• OCM Business Process Engineering, Implementation and Continuity	Rate of Assigned Change Adoption and Utilization

Product Overview - Outcomes

Transformation results in valued, sustainable and connected outcomes...

Operational...

- *Highly respected in every work effort, SDLC and CPIC endeavor*
- *Highly collaborative, efficient and effective attention to core missions*
- *Consistently meeting and exceeding performance expectations*

Organizational...

- *Balanced growth and resource investments*
- *Highly respected and functional communications channels*
- *Improving reputation and growing interest in deeper collaboration*

Strategic...

- *Systems and project selection fully aligned with defined strategy*
- *Accurate and compliant SDLC and CPIC portfolio*
- *Well-articulated path forward to operational excellence*

Product Overview – Out of Scope

As a contracted product/service, the following remains out of scope...

- *Federal Notifications of Intent to Reorganize and/or Realign*
- *Final Review of or Approval for Official Federal Reorganization Package for Approving Officials*
- *Submission of Official Federal Reorganization Package to Approving Officials*
- *Formal Federal Notification of Proposed Reorganization*
- *Federal Funding, Admin Codes, Budget and/or Congressional Notifications*
- *Federal Human Resource Activities and/or Position Management*
- *Federal Performance Evaluation, Planning and/or Transformational Actions*

Product Overview – Sample Deliverables

The sample deliverables listed below are all subject to negotiation based upon a common understanding of stated need as outcome of an independent assessment of projected change characteristics and organizational attributes...

- Complete OCM plan, including OCM Transformation Tiger Team
- Integrated Project and OCM schedules and activities
- OCM strategy outline and presentation
- Full range of interviews assessments, tables and diagrams
- Detailed Communications planning, key messages and formal plan
- Sponsorship roadmap, planning, design, start-up and implementation
- Group and individual coaching agendas and plans
- Resistance management plan and assessment worksheets
- Training requirements and delivery plans
- Employee feedback, assessments, presentations and Transformational action plan
- Cost-Benefit Worksheet
- Organizational attributes worksheets, assessments and measurement metrics
- Organizational Project Change Triangle (PCT) assessments and performance tracking
- Change characteristics worksheets and assessments

Product Overview – Conclusion

Regardless of whether you are just starting out on your organizational transformation journey or are already deep into an existing change initiative, the path forward often gets lost in the uncertainty or ambiguity that surfaces between patience and perseverance in the pursuit of progress from mediocre to exceptional. Pathways leads discovery and connects outcomes that illuminates, and addresses change adversities and resistance in your journey. Contact me today to see how Pathways can be tailored and applied in your pursuit of progress from mediocre to exceptional!



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Thank You!