

Pathways

Leading Discovery - Connecting Outcomes

Organizational Agility – Operational Excellence

*Driving Value Across Sustainable Incremental Change*

## **Organizational Change Management (OCM) and Informatics**

### **A White Paper Federal Organizational Change**

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## Background

A common risk and most often an issue of any Informatics acquisition within the federal government is a lack of adoption and/or utilization by those for whom the acquisition is intended to benefit. This frequently results in on-going rework in both requirements and deliverables leading to obsolescence or abandonment before realizing its intended benefits.

Investment management often fails to look beyond the traditional factors of Informatics support services. Most frequently packed in such services are Standard Operating Procedures, Operations Manuals, Run Books, Training Materials, Training Delivery, Help Desks among others. Occasionally, there are calls for communication campaigns and participation in traditional project management outcome management such as change control boards.

At the risk of Informatics becoming “shelf” ware or “vapor” ware, essential factors that drive adoption and utilization are often overlooked or excluded. Those factors, often known as people factors, are referred to as Awareness, Desire, Knowledge, Ability and Reinforcement. As with any change, especially with changes introduced by Informatics, the single most commonly under/unaddressed issue in successful change is resistance or barrier management.

Organizational (the people side) Change Management (OCM), as a complimentary discipline in collaboration with project management disciplines, focuses on increased rate of change adoption and utilization as a basis for enhancing Informatics return on investment and the avoidance of premature obsolescence or abandonment.

The net effectiveness of OCM rests with the trust factor. The key to the trust factor lies in understanding, engaging and respecting the lowest levels of supervision and management within the organization. OCM begins with active and visible sponsorship and earns respect through analysis of the change, its attributes, impacts and readiness of impacted parties to embrace, adopt and utilize the change.

Trust develops through positive collaboration. Within the federal government, there are numerous factors impacting OCM and collaboration not found within the private sector. Those factors are federal department, agency, center, office, division and branch rules and regulations, policies, procedures, and investment controls, not to overlook congressional mandates.

The need is to take all these factors, roles and realities into consideration when establishing adoption and utilization goals, objectives, and plan for success in changing from the current state to the future state. The OCM plan is approved and executed in collaboration with the Informatics

implementation, with the collaboration of an independent, skilled OCM team to assure progress, positive collaboration, and on-going coordination between impacted parties in the quest from mediocre to exceptional.

## Risks within a Disconnected Operational Organization:

- Heightened Resistance or Barrier to Change
- Affront to Control and/or Authority
- Threat to Positional Security and/or Job
- Feelings of Undue Outside Influence
- Fear of Change and/or Uncertainty
- Redirection or Loss of Projects
- Realignment of Assignment Priorities
- Reprioritization of Work-in-Progress
- Redefinition of Performance Expectations
- Reorganization and Change in Manager
- Exposure through New/Refined Metrics
- Speculation/Gossip
- Misaligned Skill Sets
- Retooling/Retraining

## Need

**Need is the essential agent of change...**

The overarching need is to connect operations and individuals with strategic performance, leading to sustainable incremental change in organizational reputation from mediocre to exceptional.

**Lost perspectives result in unfavorable outcomes...**

Operational:

- Contempt and compromise become the operating norm
- Value-add and collaboration are practically non-existent
- Consistently falling short of performance expectations

Organizational:

- Subtle to substantial disconnect occurs over time
- Plausible and rational explanations drive decline
- Loss of active senior leadership sponsorship

Strategic:

- Inability of the organization to articulate justifications and direction
- Incomplete and inaccurate SDLC and CPIC portfolios
- Pursuit of operational excellence is counter intuitive

## Characteristics of a Disconnected Operational Organization

- Organizational purpose and performance declines occurs over time
- The culture has become one of contempt and compromise
- Respect for the organization becomes indifferent rather than earnest
- Perceived value and collaboration with the wider organization declines
- Organizational roles are transferred within the wider organization
- At best, wider organizational involvement is met with skepticism

## Common Observations Leading to Sustainable Incremental Change

- Many plausible and rational explanations for organizational decline
- It is seldom that a single factor triggers mediocracy
- Purposed focus on organizational persona and relationships
- Independent and objective discovery with highly collaborative analysis
- Active Senior leadership sponsorship and management execution
- Respect is found in strategic performance and operational excellence

## 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

## Transformation Characteristics

- Begins with Rebuilding Trust
- Led by Independent Discovery
- Supported by Broad Analysis
- Substantiates Focused Change
- Highlights the Organization Persona
- Calls for Efficient and Effective Communications
- Defines Training and Mentoring
- Frames Individual Performance
- Fuels the Drive for Operational Excellence
- Fosters Broader Collaboration
- Drives Organizational Persona and Reputation

## OCM Support Acquisition

The Purpose of OCM Support Acquisition is to lead and facilitate organizational change brought about by Technology / Information Systems Acquisitions to safeguard against obsolescence or abandonment of Information throughout their entire acquisition lifecycle as well as to build and support the organization's change capability and capacity.

Achieving desired, repeatable results through Organizational Change Management (OCM) does not come from wishful thinking or hoping luck holds out. You might be able to complete OCM without a methodology or plan in place, but getting consistent, reliable results in any OCM effort requires a proven OCM team approach that is scalable and can be applied along any phase of an acquisition lifecycle.

## Value Proposition

Together, the disciplines of organizational change management and project management present a unified value proposition for achieving successful change. The unified value proposition sets the foundation for the tactical integration of organizational change management and project management. The 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

## Definition

Mutual understanding begins with common definition...

- Organizational Change is focused review and modification of management structures and business processes. Organizations must adapt, adopt, and utilize change to assure success.

However, success should not lead to complacency. To stay a step ahead of the game, organizations need to look for ways to do things more efficiently and cost effectively. There is no need to fear change. Instead, organizations should embrace change as the foundations for enduring success.

Just like with individuals, organizations experience change as they move through life. They can happen for a variety of reasons. However, in the end organizations change how they do things and often how they are structured to better meet their goals. Organizations, like individuals, have unique practices and cultures.

- Organizational Change Management (OCM) is 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, utilization, effectiveness, and proficiencies.

Often OCM is visualized as a “reorganization.” However, organizational change is also found in and driven by changes in the way people due their current work or transformation. There is a remarkably close correlation between business process engineering and organizational change. Yet, still without any change to business process, the very culture or persona of the organization often becomes its greatest obstacle to success.

It is important to note, based upon extensive market research, what OCM is and what OCM is not.

OCM Is Not:

- A stand-alone process for designing a business solution
- A process improvement method
- A stand-alone technique for improving organizational performance
- Documentation version control
- Just a communications plan
- Just managing resistance or barriers to change

OCM Is:

- The processes, tools, and techniques for managing the people-side of change
- A method for reducing and managing resistance or barriers to change when implementing process, technology or organizational change
- A necessary component for any organizational performance improvement process to succeed, including programs like Six Sigma, Business Process Reengineering, Total Quality Management, Organizational Development, restructuring and continuous process improvement
- How we drive the adoption and usage we need to realize business results
- How we enhance the organizational change capability and capacity to assure sustainable incrementation change

Sustainable incremental change results in valued outcomes...

- 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 along with Organizational Change Management (OCM)
- Process activities are segmented into three (3) distinct phases of OCM; Preparing, Managing/Assisting and Reinforcing Organizational Change
- Although each has its unique attributes, 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

## Scope of Work

OCM at the project level focuses on creating the actions required while OCM at the individual level focuses on the outcomes desired and occurs one individual at a time. The independent skilled OCM Team serves to lead and guide the OCM initiative on its journey from mediocre to exceptional.

- Organizational Change Identification, Impact and Justification
- Structure Organizational Change Initiatives, Goals and Objectives
- Initial and Periodic, Individual and Organizational, Assessments
- Integrate Organizational Change Management with Project Management
- Drive for Organizational Change Adoption and Utilization for Sustainable Success
- Substantially Enhance Organizational Change Capability and Capacity

The Scope of work is segmented into three (3) distinct phases of OCM activities, Preparing, Managing/Assisting and Reinforcing Organizational Change. Although each has its unique attributes, they 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.

### 1. Prepare for Organizational Change (Plan)

- Define the OCM Strategy
  - Identify Organizational Change Characteristics
  - Identify Organizations and Organizational Attributes
    - Organizational Change Impacts
    - Organizational and Individual Change Readiness
  - Document OCM Strategy
  - Integrate Project and OCM Strategy/Schedules
- Define the OCM Team per OCM Strategy
  - Acquire Resources
  - Assess OCM Team OCM Competencies
  - Prepare the OCM Team for OCM Delivery
- Develop the Organizational Change Sponsorship Model
  - Identify Sponsors and Stakeholders
  - Assess Sponsor OCM Competencies
  - Prepare Sponsors for OCM Sponsorship
  - Prepare Managers for OCM Support

### 2. Manage/Assisting with the Organizational Change (Do/Act)

- Develop/Revise OCM Plan (DO)
  - Communications Plan
  - Coaching and Mentoring Plan
  - Training Plan
  - Sponsorship Roadmap
  - Resistance or Barrier Management Plan

- Take Action and Implement OCM Plan (Act)
  - Customize OCM Plan Activities to Factors Affecting
    - Awareness
    - Desire
    - Knowledge
    - Ability
    - Reinforcement
- 3. Reinforce Change (Check)
  - Collect and Analyze Organizational Change Activity Feedback
    - Listen to directly and Indirectly Impacted Audiences
    - Audit Organizational Change Compliance
    - Analyze OCM Effectiveness
  - Diagnose Gaps and Manage Resistance or Barrier to Organizational Change
    - Identify Root Causes and Pockets of Resistance or Barrier
    - Develop Transformational Action Plans
    - Enable Sponsors and Coaches to Address Transformational Actions
  - Implement Transformational Actions and Celebrate Successes
    - Implement Transformational Actions
    - Celebrate Early Success and Reinforce Organizational Change
    - Conduct “After Action Reviews”

## Federal Scope

Federal scope is governed by the Office of Personnel Management (OPM). Each organization thereafter maintains its own set of additional constraints in terms of reorganization and transformation actions.

- 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

## Targeted Achievements

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 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 or Barrier
- Increased effectiveness of Project Delivery
- Higher Rates of Change Adoption and Utilization
- Enhanced Program Return on Investment
- Enhanced organizational change capability and capacity

# Targeted Outcomes:

Transformation results in valued 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 projects fully aligned with defined strategy
  - Accurate and compliant SDLC and CPIC portfolios
  - Well-articulated path forward to operational excellence

In greater detail...

- Operational:
  - Fully Vetted Internal Processes Supporting Core Responsibilities and Financial Integrity
  - Improving Mission and Vision Focused Service Delivery Ownership for Core Missions
  - SMART Individual and Organizational Performance Based Metrics
  - 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:
  - An Organization Structured and Goaled for Sustainable Success
  - Well Positioned for Respect and Broader Collaboration
  - Fully Educated, Equipped, Empowered and Engaged First Level Federal Management
  - Balanced growth and resource investments
  - Highly respected and functional communications channels
  - Improving reputation and growing interest in deeper collaboration
- Strategic:
  - Alignment with the OPHPR and IRO Strategic Plans
  - Clearly Articulated and Communicated Organizational Plan and Relevance
  - Clearly Defined and Communicated Detailed Path forward to Organizational Excellence
  - Systems and project selection fully aligned with defined strategy
  - Accurate and compliant SDLC and CPIC portfolio
  - Well-articulated path forward to operational excellence

## OCM Team

Each organizational change initiative is unique in its approach to its application of OCM. Structuring the OCM Team for success is no different. Due to competing and often conflicting objectives and priorities, it is necessary to introduce a truly independent skilled OCM team. The goal is to structure the skilled OCM team to optimize its impact towards the resolution of the competing and often conflicting objectives and priorities on the journey from mediocre to exceptional.

The OCM Team success is segmented into 3 distinct factors: skills, structure and performance indicators. Skills, structure, and performance indicators are each directly correlated to preparing, managing/assisting and reinforcing organizational change.

### 1. OCM Team Skills;

- 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

### 2. 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 or tiger team
- Change management being a responsibility assigned to one of the project team members

The key in developing a change management strategy is to be specific and make an informed decision when assigning change management responsibilities and resources. The sponsor coalition describes the leaders and managers who need to be onboard and actively engaged in leading the change. The primary sponsor is the person who authorizes and champions the change. This person must be actively and visibly engaged in the change throughout the project. They also have a part 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.

3. Tailored Approach:

- Tiger Team to Organization to Operations Progression
- Assessment, Planning, Knowledge Building, Transformation
- Strategic and Operational Focus
- Assess, Assemble and Align
- Educate, Equip and Empower
- Monitor, Manage and Mentor
- Define, Execute and Deliver
- Measure, Analyze and Adjust
- Review, Recognize and Reward

4. Key Success Factor to Achieving Transformation:

- Cross-Functional, Fed and Contractor Tiger Team Composition
- Senior Management - Active and Visible Sponsorship
- First Level Management - Compliant and Constructive Leadership
- Individual Level - Commitment and Participation
- Building Sustainable Organizational Change Capability and Capacity

5. 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

## Special Considerations

To be clear, OCM is an extremely broad topic and subject to wide interpretation. The Federal Interpretation for OCM tasks, specific to vendors, is “in support of” OCM. The broader interpretation of OCM remains the discrete domain of federal staff in accordance with Policies and Procedure such as Securing Approval of Changes in Federal Organization and Functions, Federal Reorganizations, and Realignments, Federal Position Management Program and other related Federal Human Resource policies, processes, and procedures. The OCM vendor has accountability for detailed collaboration with its federal client.

Additionally, there are compliance factors associated with existing formal methodologies and workflows specific to impacted Federal departments, agencies, centers, offices, divisions and branches.

Further, Independent, Skilled OCM Team support and collaboration may involve the use and/or collaboration of materials or collateral from other organizations and other vendors as a direct output of the changes being introduced by other vendor(s).

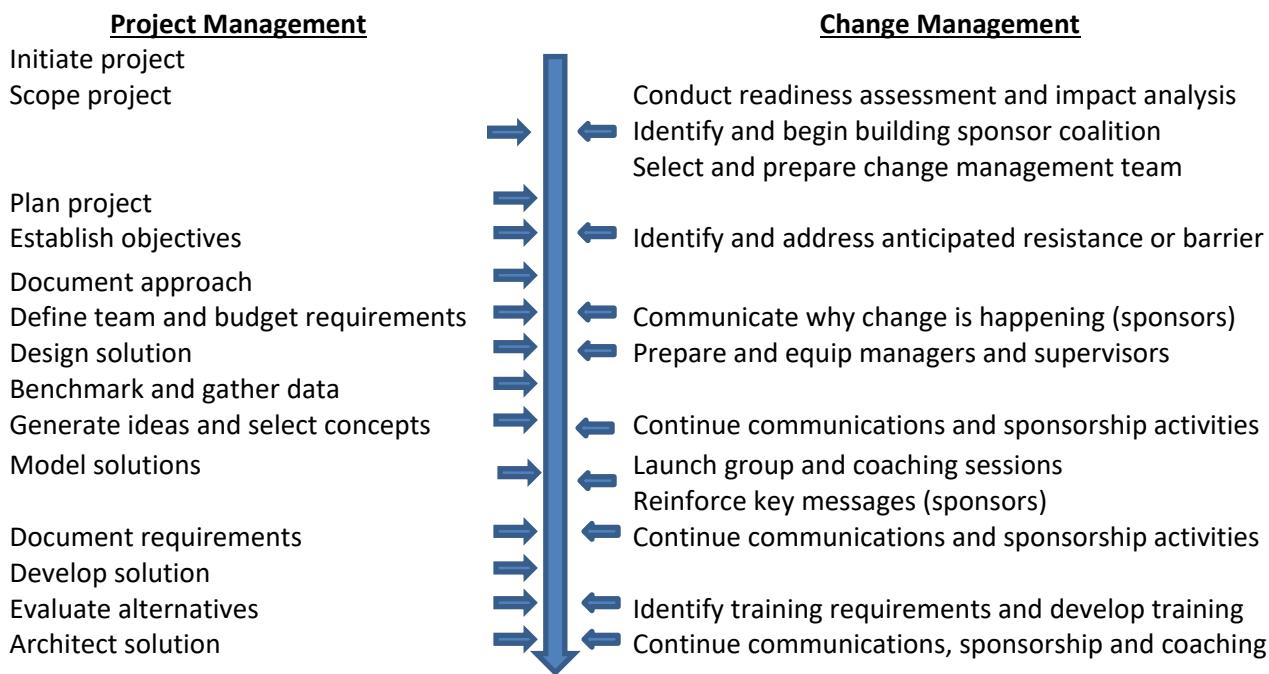
## Success Lessons Learned

- Tightly integrated Project and Organizational Change Management key to overall success
- Diverse, knowledgeable, independent, internal and external Change Management Team
- Established as Program Success Factors in Collaboration with Program Sponsors and OCM Sponsorship
- Established OCM Goals and Objectives to Support Achievement of Program Success Factors
- Sourced from Organizational and/or Individual Assessment Outcomes, Both Initial and On-Going
- Focused On Changes Impacting the Way Work is Executed and/or Delivered
- Monitored and Measured by Key Performance Indicators (KPI) such as Rates of Adoption and Utilization
- Constrained by Federal Reorganization and/or Realignment Policies and Procedures
- Resources Allocated to Communications, Training, Coaching, Mentoring and Resistance or Barrier Management
- Communications Tied to Strategic Key Messages Supported by Sponsors
- Communications Vehicles Applied Based Upon Impacted Audiences Receptiveness
- Communications Campaigns Measured by Following and Feedback
- Training Tied to Business Product and Resistance or Barrier Management
- Training Media Based Upon Impacted Audiences Receptiveness
- Training Measured by KPIs and Demonstrated Expertise
- Coaching and Mentoring Tied to Training and Individual Change Readiness
- Coaching and Mentoring Aligned with Trusted First Line Level Management
- Coaching and Mentoring Measured by Individual and Organizational KPIs
- Resistance or Barrier Management Tied to Communications, Training, Coaching and Mentoring
- Resistance or Barrier Management Governed by On-Going Individual and Organizational Assessments
- Resistance or Barrier Management Measured Over Time by KPIs and Program Success Factors

# Project and Organizational Change Integration

When an organization introduces a change within a project or initiative, that change needs to be effectively managed on both the technical side and the people side (OCM). The technical side focus ensures that the change is developed, designed and delivered effectively. The discipline of project management provides the structure, processes and tools to make this happen. The people side (OCM) focus ensures that the change is embraced, adopted and utilized by the employees who must do their jobs differently as a result of the project or initiative. The discipline of change management provides the structure, processes and tools to make this happen.

Success for a project or initiative results from an effectively designed, developed and delivered solution that is embraced, adopted and utilized by impacted employees. Project management and change management are complementary disciplines with a common objective. When integrated in the delivery of a project or initiative, project management and change management together provide a unified approach for achieving the desired results and outcomes of organizational change.



## Sample Deliverables

The deliverables described below are all subject to negation based upon a common understanding of stated need as identified by an independent assessment of change characteristics and organizational attributes. (NOTE: Need a documented description for each potential deliverable below)

- Complete OCM plan, including OCM Transformation Tiger Team(s)
- Integrated Project and OCM Schedules and activities
- OCM strategy outline and Presentation
- Sponsor interview
- Communications planning and Formal Plan
- Communications key messages: executives, middle managers and employees
- Sponsorship roadmap, planning, design, start-up and implementation
- Coaching plan and training
- Group and individual coaching agendas and plans
- Resistance or barrier management plan and Assessment Worksheets
- Training requirements
- Employee feedback presentation
- Transformational action plan
- Cost-Benefit Worksheet
- Organizational Measurement Matrix - measuring results
- Organizational attributes worksheets and assessments
- Organizational Project Change Triangle (PCT) assessments and performance tracking
- Organizational Change Definition, Best Practices Audit and Top Trends Assessments
- Change characteristics worksheets and assessments
- Impact Index assessments
- Transformation Tiger Team member competency assessments
- Sponsor assessments, tables and diagrams
- Manager Competency Assessments
- Training needs assessments
- Employee feedback Individual assessments
- Individual Business, Personal and Strategic Change Worksheets

## Sample Activities

The activities outlined below are all subject to negation based upon a common understanding of stated need as identified by an independent assessment of change characteristics and organizational attributes.

### Building Blocks

Relationship of deliverables and activities to the application of a structured process begins with an understanding the building blocks of OCM. There are 5 distinct blocks of OCM activities: Awareness, Desire, Knowledge, Ability and Reinforcement. Equally important is to understand how they are used.

#### Awareness of the need for change

- Why is the change happening?
- Why is the change happening now?
- What is the risk of not changing?

#### Desire to participate and support the change

- What are the personal motivators and organizational drivers that would cause me to support the change?

#### Knowledge on how to change

- What knowledge, skills and behaviors are required during and after the change is implemented?

#### Ability to implement required skills and behaviors

- How do I demonstrate the ability to do my job the new way?
- What barriers may inhibit me from making the change?

#### Reinforcement to sustain the change

- What will make the change stick?
- What are the rewards, recognition, incentives and consequences?

#### Used in many ways

- Making sense of change
- Guiding OCM plans
- Measuring progress
- Diagnosing gaps
- Developing transformational actions
- Enabling managers and supervisors

## High Level Activities

Putting the building blocks into a structured process perspective, below are OCM activities aligned to a very high level of organization in anticipation of Project Management integration.

### Build Awareness and Desire:

#### Help them connect OCM to what they care about

- Make a direct connection between effectively managing the people side of change, and financial and strategic performance
- Show that the success of organizational change is tied directly to the success of individual change
- Provide data demonstrating that effective OCM dramatically increases the probability of meeting objectives, finishing on time and finishing on budget
- Document the unnecessary costs and risks resulting from not managing the people side of change effectively
- Declare that: "If you want to realize the ROI you expect on the projects that you are funding, we need effective OCM and your role as sponsor is key"

### Build Knowledge and Ability:

#### Help them understand their role

- Share the roles and responsibilities - clearly articulate what they need to be doing
- Share the biggest mistakes sponsors make - highlight what they should avoid doing and the risks
- Leverage OCM research
- Use examples of good and bad sponsorship

### Build Ability and Reinforcement:

#### Help them fulfill their role

- Create a sponsor roadmap for them
- Do the leg work for them
- Build presentations
- Craft key messages
- Write the text of emails
- Get them on calendars
- Coach them
- Give them recognition and a "pat on the back"
- Make it as easy as possible for them to be the "face and voice" of the change

## Project and OCM Level Activities

Project Managers ascribe to 9 PMI PMBOK disciplines. OCM aligns to the following 3 phases as a basis for Project Management integration.

### Phase 1: Preparing for change

- Conduct readiness assessments
- Develop risk analysis
- Identify special tactics
- Identify anticipated resistance or barrier
- Document strategy
- Architect team structure and prepare the team
- Develop sponsorship model and prepare sponsors

### Phase 2: Managing change

- Understand customization based on strategy analysis
- Create communications plan
- Create sponsor roadmap
- Create coaching plan
- Create training plan
- Create resistance or barrier management plan
- Integrate plans into the overall project plan
- Execute OCM plans

### Phase 3: Reinforcing change

- Collect feedback proactively
- Listen to employees
- Audit compliance
- Identify gaps
- Identify common and pockets of resistance or barrier
- Celebrate successes
- Transition to new business as usual

## Individual Level Integration Activities

Below are further activities by OCM disciplines when focusing on the lowest, but greatest, common denominator of OCM... the individual.

### Phase 1: Prepare for change

- Identify impacted groups
- Define the individual changes required
- Anticipate resistance or barrier from impacted groups
- Create a sponsor model representing impacted groups

### Phase 2: Manage change

- Answer the question: what do we communicate?
- Answer the question: why are sponsors important?
- Answer the question: what coaching is needed?
- Answer the question: what training is needed?
- Answer the question: how will resistance or barrier be managed?
- Sequence activities appropriately

### Phase 3: Reinforce change™

- Collect individual feedback
- Listen to impacted employees
- Audit compliance at the individual level
- Measure if the change is happening
- Identify gaps and developing appropriate responses

## Project and Individual Level Activities

Therefore, when correlated, below represents a mature perspective of the 3 collaborative OCM phased activities for Project Management integration.

### Phase 1: Preparing for change

- Conduct readiness assessments
- Develop risk analysis
- Identify special tactics
- Identify anticipated resistance or barrier
- Document strategy
- Architect team structure and prepare the team
- Develop sponsorship model and prepare sponsors

### Phase 2: Managing change

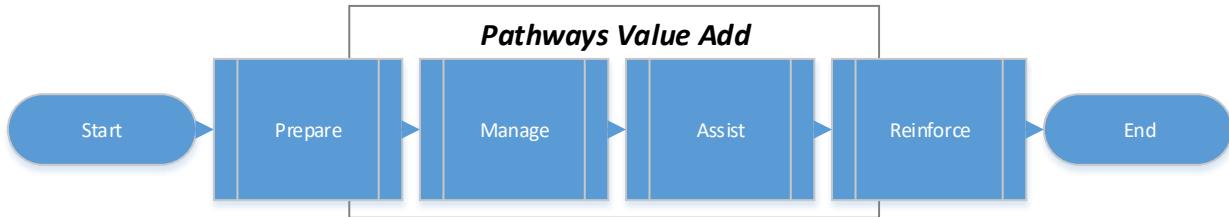
- Understand customization based on strategy analysis
- Create communications plan
- Create sponsor roadmap
- Create coaching plan
- Create training plan
- Create resistance or barrier management plan
- Integrate plans into the overall project plan
- Execute OCM plans

### Phase 3: Reinforcing change™

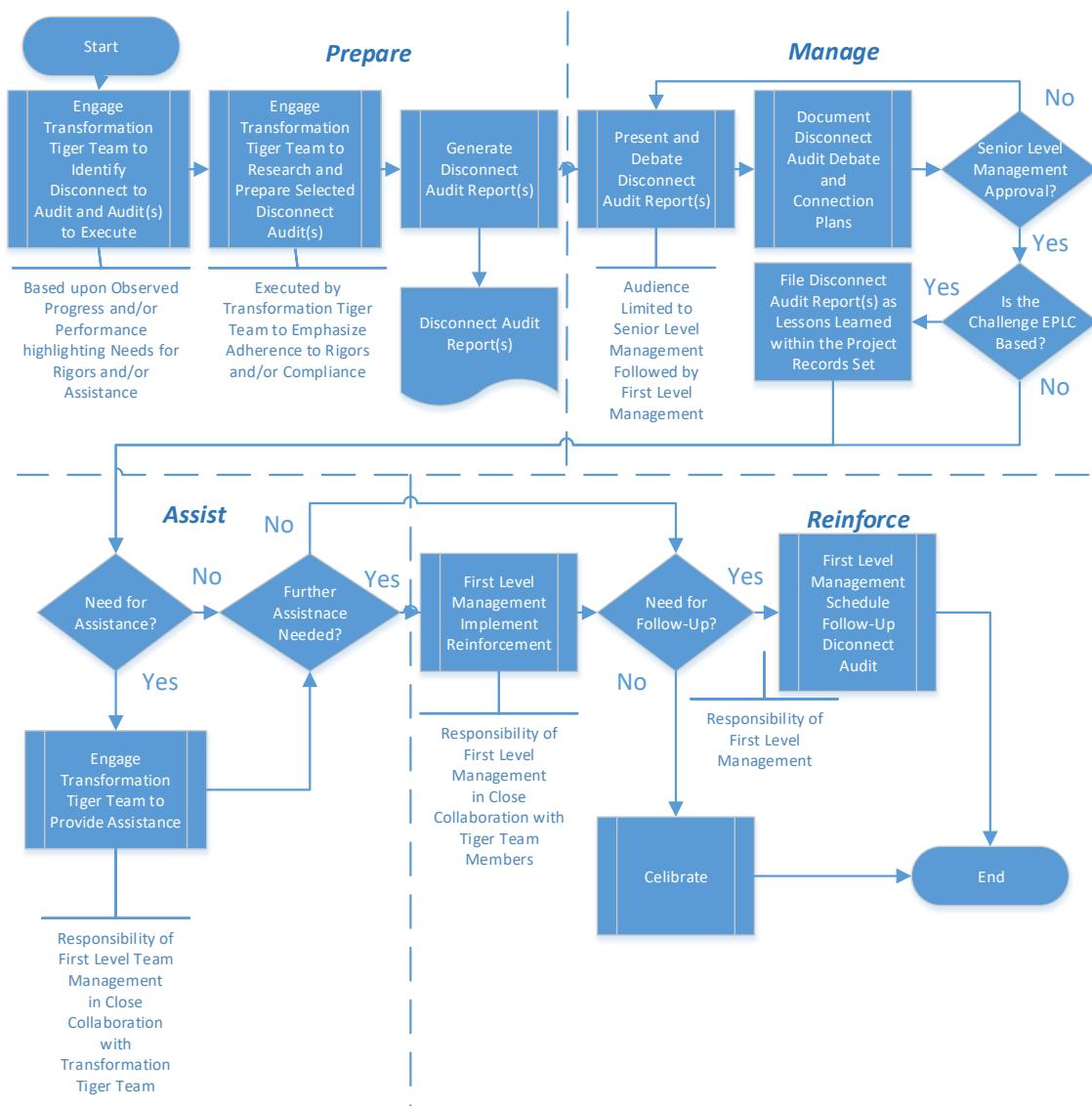
- Collect feedback proactively
- Listen to employees
- Audit compliance
- Identify gaps
- Identify common- and pockets of resistance or barrier
- Celebrate successes
- Transition to business as usual (assessments and communications plans are
- Two common tools that can be effectively integrated)

# Process Pictorial

At a high Level



In a little more detail



## 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 illuminate and address change adversities and resistance or barrier 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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