

Change Management Framework Guide and Schedule

A human-centric approach to implementing your digital transformation program



Digital Means Technology, Transformation Depends on People

“21% of global services decision-makers cited implementation of new processes and capabilities as one of their greatest challenges.”

Forrester’s Business And Technology Services Survey 2022¹

Enterprise organizations embark on digital transformation programs for a number of reasons. You want to reduce costs, minimize waste, boost margins and increase revenue. But as much as anything else, you want to create operational efficiencies by remedying the problems caused from having teams, business units and departments working in individual siloes. With each unit pursuing its own set of objectives and using its own particular set of procedures.

One of the key components then in any digital transformation program is the software solution you acquire to centralize your data, streamline your processes and integrate any existing software and systems. You need to have everyone working in the same, standardized way using the same facts and figures.





The problem is, that software can end up sitting un-used and unloved, gathering dust on a digital shelf. Sometimes, that's because the software chosen turns out to be impossibly complicated, so that none of your employees are prepared to invest the time needed to find out how to use it.

But as often as not, it's because doing things the way things have always been done has become culturally and institutionally ingrained.

There's a general fear that, whatever issues a team might currently be experiencing, things could become even worse if everyone suddenly started trying to do their work in an unfamiliar way, and using a system that none of them fully understood.

As Deloitte write in their 2023 paper, Digital Transformation, Adoption Challenges and Proposed Solutions:

“End-to-end digital transformation is complex and usually calls for a change in processes and collaboration, and how things get done and reported.”

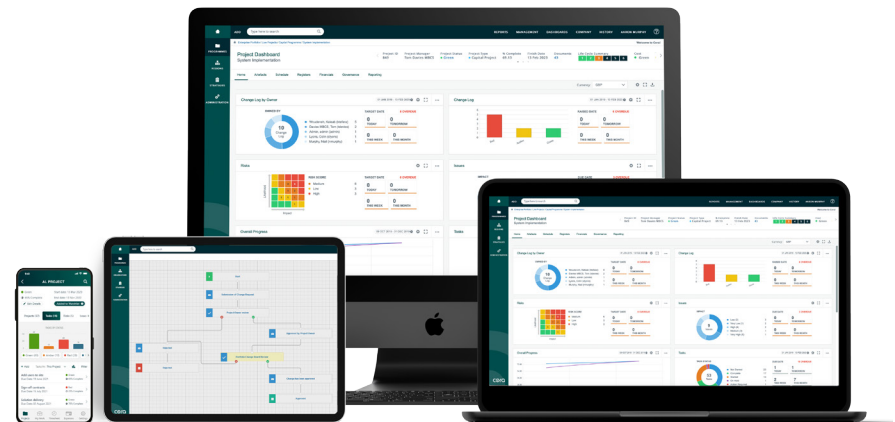
Deloitte²

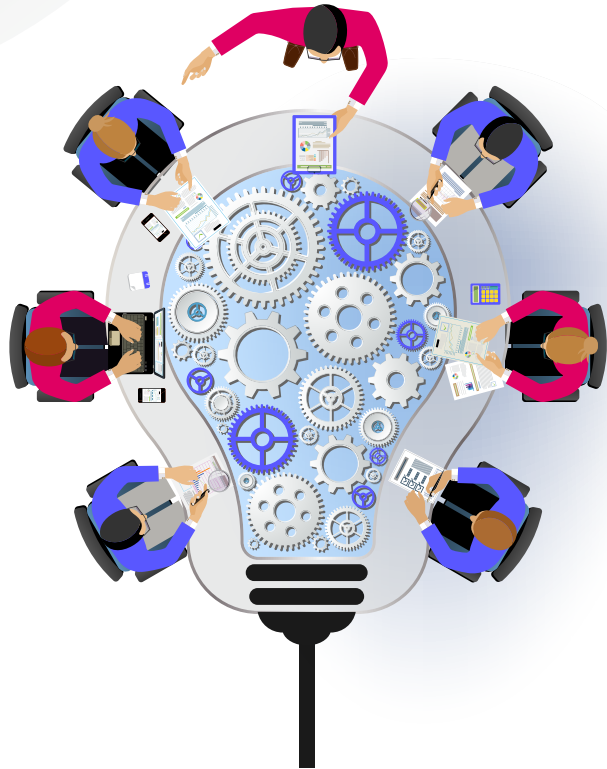
It's vital then that you have a framework in place to help you shepherd your employees from the old system onto the new one. You need to have and follow a schedule in which you clearly explain and demonstrate the different ways that all of their jobs are going to be made easier. As Jeff Hopkins, Honeywell VP, Global PMO and Intelligrated PMO Leader explained to us:

“You’re going from a world where you’re in emails and spreadsheets to a world where your data’s more democratized and you can access and leverage it more easily.”³

The best way to do this is with a number of small, incremental steps that are planned and executed over a period of weeks and months, rather than with one sudden flick of a switch that gets activated overnight.

What's required is a program of gradual, gentle persuasion in which the many benefits resulting from the new way of doing things are explained and demonstrated. So that instead of resisting the change program, everyone will see it as an opportunity to do what they do more effectively. Which will be good for them and good for the company.





“Once you get people over and they’re set up and operational in the new world, nobody wants to go back. So the question is, what do our people need to successfully navigate that transformation?”³

In other words, the key to successful change management comes from putting less emphasis of technology, and more of the focus on the transformation element. As Deloitte conclude:

“A human-centric view of managing change is crucial for realizing the intended goals and benefits of a digital transformation programme.” Deloitte

This guide provides you with that framework, by giving you a schedule you can implement that guarantees quick and frictionless buy-in across your organization.

1. <https://www.forbes.com/sites/forrester/2023/06/23/change-management-in-digital-transformation/>
2. https://www2.deloitte.com/content/dam/Deloitte/in/Documents/Consulting/in-ad-digital-transformation-SAP_POV_noexp.pdf
3. “5 Tips to Accelerate Digital Transformation”, Project Management Paradise podcast, ep 148 https://www.youtube.com/watch?v=91a6Pdsl_1q&t=1654s

Change Management Schedule

Day 1

Company-wide Announcement

Who: Everyone in the organization

How: At a company meeting, in any newsletters and by email

You've purchased Cora and the implementation process is about to begin, so the first step is to inform everyone throughout the company about this new beginning. There are two things you need to emphasize:

- ⦿ You need to explain in simple terms how this is going to make doing their jobs so much easier, and the ways it will help to make the company more profitable.
- ⦿ To ensure the smooth transition from the old to the new way of doing things you've devised a carefully calibrated plan of action. An internal team will be working with Cora to ensure its successful implementation, and everyone involved will be walked through the change management process by their senior management.

Week 1

Project Kickoff

Who: PMO team

How: Email

The day after the announcement, or on the Monday after, the individuals who are part of the Cora implementation/change management project team are contacted and given the schedule detailing the project's various stages, milestones, workshops, etc.

It can help with engagement to get creative by giving the project its own name, tagline and logo, as this gives the project its own identity and supports recall value amongst employees (see sidebar).

Weeks 2-5

Pre-training and Project Updates

Who: PMO team

How: Email

Project team members need to be kept up to date about pre-training events and developments, and around any changes that might have taken place.

Sidebar



The Pegasus Project
The Sky's the Limit

Getting Everyone On Board - Don't be afraid to get creative

There are all sorts of creative ways to gently nudge everyone on your team and to encourage them to get on board.

Begin by giving your Cora implementation/Change management program its own name, logo and tagline, eg: The Pegasus Project

This will increase engagement, improve recall and encourage discussion throughout the team and across the organization.



Shout Outs and Spotlights

Make sure to use company meetings, quarterly business reviews, newsletters and any of the platforms your organization uses to highlight events and celebrate the continued progress of your transformation program.

Weeks 4-10

Workshops

Who: PMO team

How: Email

The purpose of the various workshops and demos is to help your SMEs familiarize themselves with Cora's features and functionalities, and to identify which elements need to be tweaked in the course of the configuration.

You need then to decide which of your SMEs are going to be assigned to each of the different areas.

Notice of the workshops scheduled then need to be shared with the participants and the rest of the team, giving details of the topics covered, when, and who from your side is going to be attending, and who from Cora.

Weeks 11-13

Workshop Review and Updates

Who: PMO team

How: Email

Tell the rest of the team which workshops have taken place, who attended and what they learnt. This will give everyone a sense of a process that's continuing to progress and is moving towards its conclusion.

Week 14

Configuration Complete - UAT Kickoff

Who: PMO team

How: Email

Now that the Cora configuration has been completed it's time to start the user acceptance testing (UAT) process. Contact the individuals involved to give them the timetable, set their expectations, allocate roles and responsibilities and distribute their scripts and training materials.

Then contact the rest of the team to let them know that the UAT process is about to kick off.

Weeks 14-17

UAT Updates

Who: PMO team

How: Email

Keep everyone up to date on the testing progress and about any major configuration reworks that are required.

Sidebar



Site Upgrades

Whenever Cora releases an upgrade or introduces new features or phase completions, use it as an opportunity to organize a Cora implementation update. So that you and the team can get together and enjoy some food and snacks as you discuss the changes made.

The key here is the free food! It's amazing how much more readily we all get on board with something when there are freebies involved. It doesn't have to be anything major, a few snacks and treats is all you need.



Feedback/Lessons Learned Sessions

Schedule one or two sessions to get together with the rest of the team to go over the lessons learned from any of the workshops, UAT sessions and demos. Again, the key here is to provide free snacks, treats or food.

Week 18

UAT Sign off

Who: PMO team

How: Email

The UAT process is now complete and the configurations are being moved over to the production site.

Week 19-24

Data Migration Plan

Who: PMO team

How: Email

Now that the UAT has been completed it's time to begin the final stage of the data migration process, migrating the data from the current system into Cora, and changing from the UAT site (and URL) over to the new Cora site (and URL).

Everyone will need to be informed of any blackout dates, the cutover date and any other significant steps that need to be taken around any of that.

Weeks 17-22

Training Updates

Who: PMO team

How: Email

Let everyone know about any changes or relevant updates during the data migration process, and keep everyone posted about the various training events around Train the Trainer, End Use Training and Admin Training that are taking place at this point.

Weeks 19-20

Go Live Announcement

Who: Everyone in the organization

How: At a company meeting, in any newsletters and by email

Congratulate the project team and any of the key individuals, and emphasize again what an important change this represents, and how much easier everyone's job is now going to be because of it.

And give any updates around the various training sessions that are still going on and are about to be completed.

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Integrate processes

Bring any existing processes into the one, central system, so everyone is working in the same, standardized way, and off the same facts and figures.



Sync your supply chain

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The Power of Predictability

Contact Us

E: info@corasystems.com | W: www.corasystems.com | T: +353 7196 22078

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