

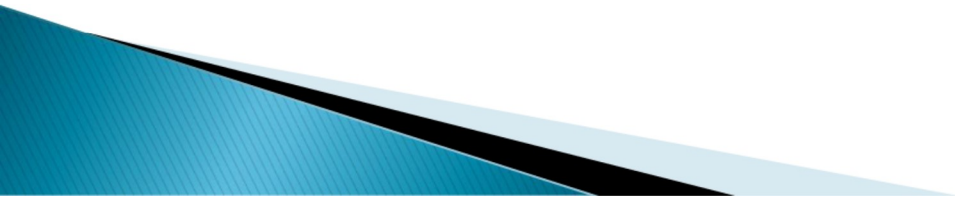
Best Practices in Organizational Change Management

Christopher F. Voehl, PMP



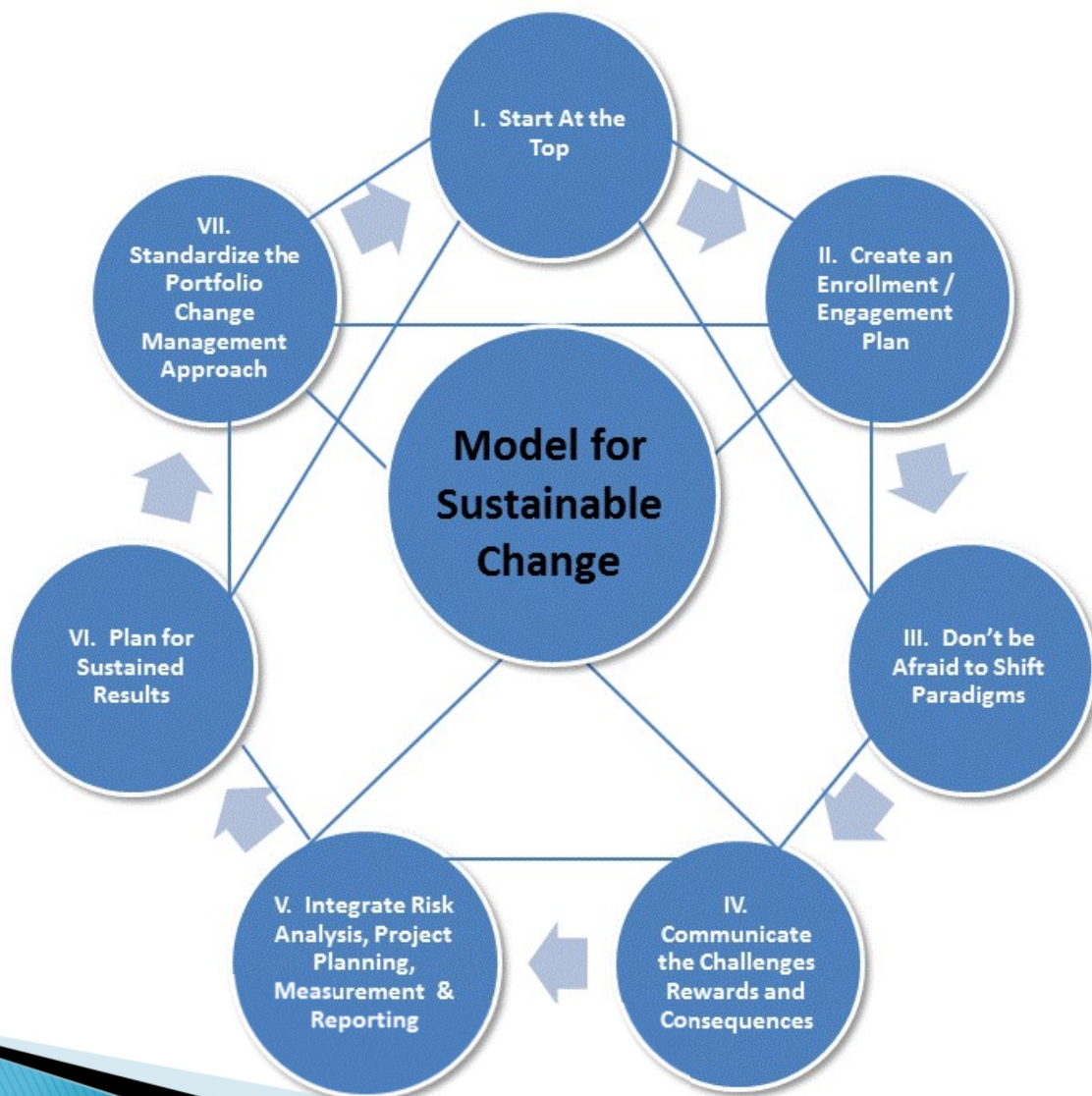
Agenda / Outline

1. Introduction / Overview
2. The Model for Sustainable Change
3. Examples in Organizational Change Management (OCM)
4. Using Business Cases to Drive Change



A New Model for Sustainable Change

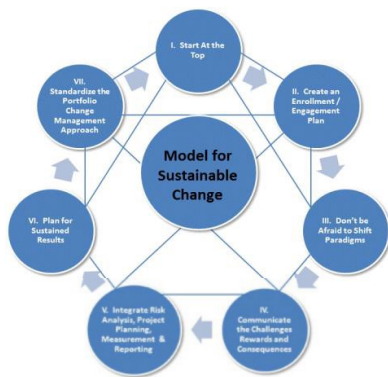
»» Section 1



Model for Sustainable Change:

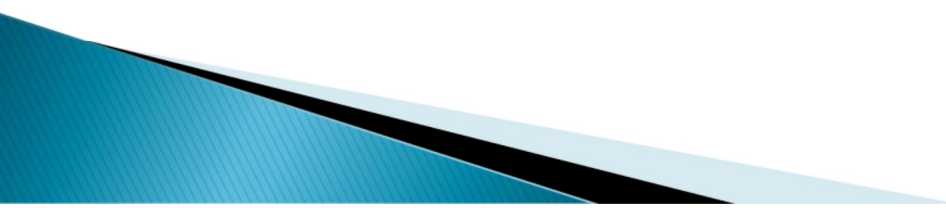
1. Start at the Top

- Understand the current state of leadership alignment
- Address any dissention among the leadership team of the strategic value or direction of the initiative
- Align the initiative with the strategic plan
- Secure horizontal alignment among leadership silos



Model for Sustainable Change:

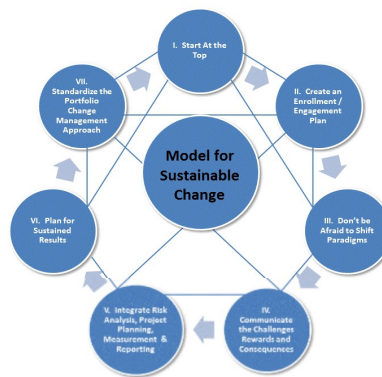
2. Create an Enrollment Plan

- Assess the culture and the people within
 - Drive alignment from the top down through the middle layers of the organization
 - Ensure those impacted are aware of the purposes and consequences of the change agenda
 - Empower informed employees to help drive change (i.e. Change Agents)
 - Change Agents work collaboratively in support of the new agenda, assist in implementation / installation
 - Plan for wider adoption, and eventual transformation
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Model for Sustainable Change:

3. (Don't be afraid to) Shift Paradigms

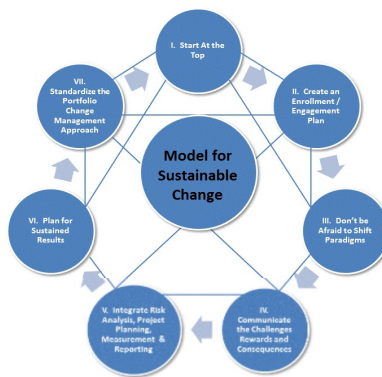
- Understand challenges with breaking the status quo
- Break the scope into manageable segments
- Identify key behaviors to sustain the change results
- Modify and reinforce positive behaviors by changing the structure of consequence and reward
- Measuring progress toward the stated goals



Model for Sustainable Change:

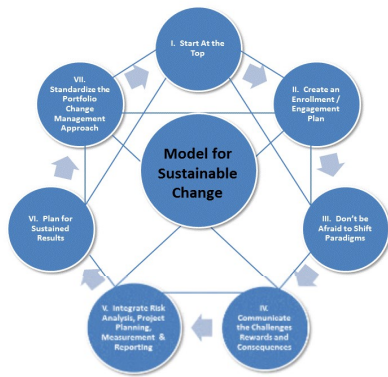
4. Communicate Challenges, Rewards & Consequences

- Communicate the WIIFM (what's in it for me)
- Be realistic about the Whys and the opportunities
- Carefully explain the Why Nots (consequences)
 - Calculate the risk of inaction
 - Provide balance of both positive and negative consequences
 - Base rewards (and consequences) on objective measures of individual and team performance



5. Integrate Risk Analysis, Planning, Measurement, and Reporting

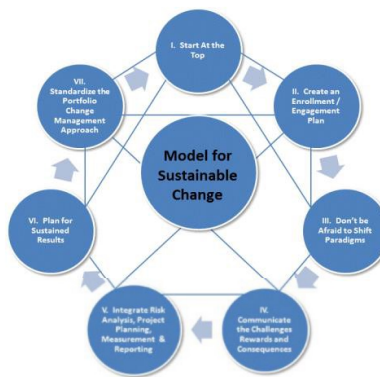
- Integrate Change Agents into Risk Analysis, Mitigation, and countermeasures planning
- Put reasonable measures and controls into place to ensure ongoing sustainability
- Provide ongoing feedback to the key stakeholders



Model for Sustainable Change:

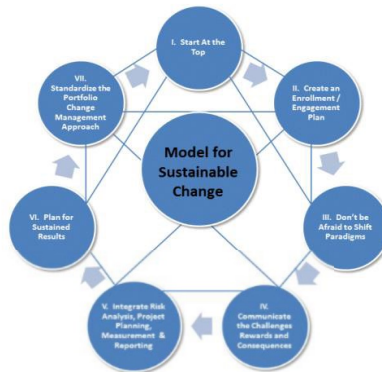
6. Plan for Sustained Results

- Start with Lessons Learned
- Plan for near term enrollment and long-term sustained results
- Establish current cultural and environmental factors
- Break down perceived barriers to change



7. Standardize the Portfolio Change Management (PCM) Approach

- Encourage mentoring of change agents via rewards
- Participate in the creation and delivery of training
- Ensure alignment with your strategic objectives
- Provide knowledge management resources, and documentation of lessons learned
- Provide expert judgment and subject matter expertise (SME) to new project teams

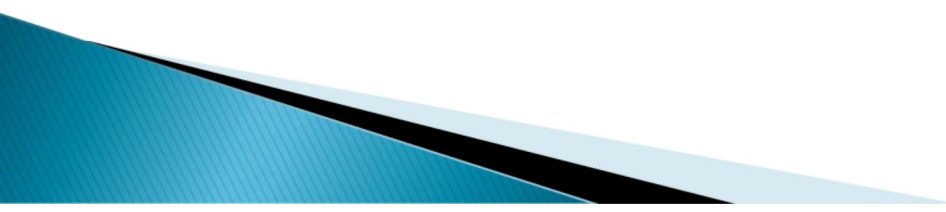


Examples in Organizational Change Management (OCM)

»» Section 2

- Disrupt the Status Quo
- Start with the “Why5?”
- Know & Understand the Key Players
- Encourage & Exhibit Two-way Dialogue
- Promote the Support of Executive Leadership


Seven Change Management Best Practices (Prosci Resources)

1. Mobilize an active, visible executive sponsor
 2. Dedicate change management (CM) resources
 3. Apply a structured CM approach
 4. Engage employees, encourage participation
 5. Communicate frequently and openly
 6. Integrate/engage with project management
 7. Engage with middle managers
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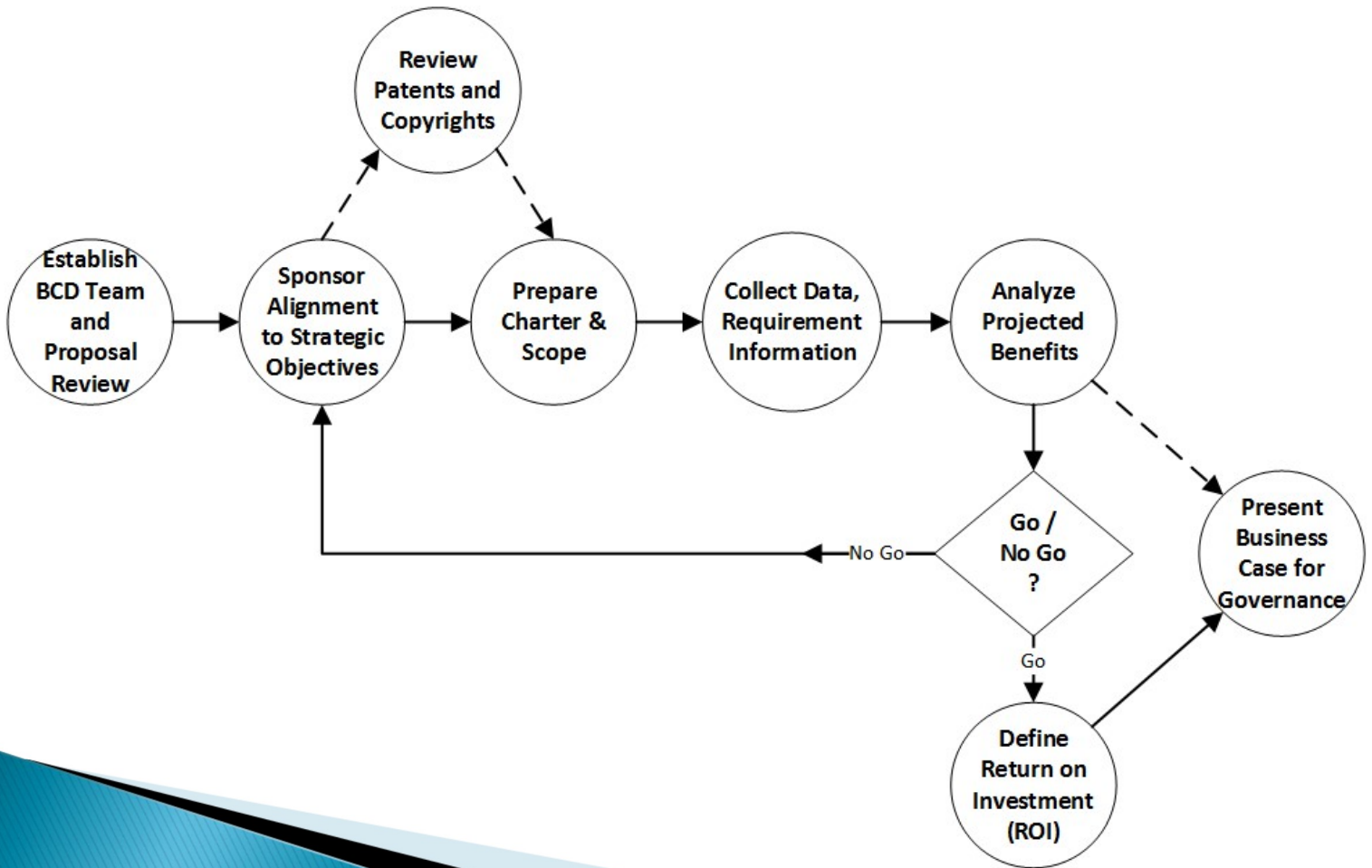
Using Business Cases to Drive Sustainable Change

»» Section 3

Business Case Creation: Essential Tasks

1. Understand the current state
 2. Document how the project will add value
 3. Validate assumptions and constraints
 4. Develop a data collection plan
 5. Assess alternative solutions for the future state
 6. Weigh costs vs. benefits
 7. Analyze and mitigate risks
 8. Identify key stakeholders, resources & skills needed
 9. Elicit and prioritize requirements
 10. Obtain consensus on the on the methods used, on the conclusions, and the decision to move forward
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Business Case Process: Activity Diagram



Business Case Template: Case Study

BUSINESS CASE

FlexNow Staffing Services

Call Center Improvement

Project

Revision History

Version	Description	Date	Updated by:
1.0	Business Case DRAFT, Project Overview	6/15/13	C. Voehl
1.5	Business Case updated based on feedback	6/16/13	F. Voehl
2.0	Business Case updated	6/22/13	J. Harrington
3.0	Business Case finalized	1/22/14	C. Voehl

Questions & Comments?

Source material available at PMI, Taylor & Francis publishing:

“The Model for Sustainable Change” Christopher Voehl, James Harrington, Frank Voehl, Project Management Institute (PMI); January 2015. <https://www.pmi.org/learning/library/model-sustainable-change-11122>

“Effective Portfolio Management Systems”; Christopher F. Voehl, H. James Harrington, CRC Press Book; October 2015.

<https://www.crcpress.com/Effective-Portfolio-Management-Systems/Voehl-Harrington-Ruggles/p/book/9781466572539>

“Making the Case for Change: Using Effective Business Cases to Minimize Project Failures”; Christopher F. Voehl, F.W. Voehl, H. James Harrington, CRC Press Book; September 2014.

<https://www.taylorfrancis.com/books/9780429254550>

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