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The Soft Side of Maximo Projects

How Organizational Change and Training can
make the difference in your Maximo
Implementation or Upgrade

July 27, 2017



Unlocking potential.
Achieving results.

Allow me to introduce myself



I'm Lauren!

I'm a Maximo-certified change management professional and trainer.

I am also a self-proclaimed nerd.

I bridge the gap between IT professionals, business leaders and end users.

I love people and understanding the psychology of change.



Lauren Poole is a **Maximo-certified change management professional and trainer**. During her seven years at a local water utility, she not only honed her Maximo skills, but she found that the key to a successful IT project often started and stopped with the attitudes and the perception of the people most impacted.

Since then, her career has focused on **bridging the gap** between IT professionals, business leaders, and end users through communications, change assessments, and training. She accomplishes all this by coaching leadership, understanding each company's unique culture, and working with all levels of the organization before, during, and after a system go-live.

When she is not getting to know her clients, she can be found "minecrafting" with her son or dancing to Allen Stone with her husband.

Agenda

What is Change Management?

What should you be doing?

Q&A



What is Change Management?



POLL

Do you know what organizational change management is?

Answer choices:

Yes, I not only understand it, but have been involved with projects that used it.

Yes, but never been involved with a project that used it.

Yes, I think I do.

No, not really. I have heard of it though.

No, never even heard of it.

What is Change Management?

change man·age·ment

noun

1. structured approach for ensuring that changes are thoroughly and smoothly implemented, and that the lasting benefits of change are achieved; focus is on the wider impacts of change, particularly on people and how they, as individuals and teams, move from the current situation to the new one.
2. the controlled identification of implementation of required changes within a computer system

- Definition according to Prosci Change Management firm, but what does it mean?

CM in Real Life – the cable TV example

A new cable provider is selected for you:

- ☐ No one asked you your thoughts
- ☐ Only given two days notice
- ☐ Installer sets it up then leaves



Frustration
Confusion
Throwing your TV out the window...

Let's take a look at change management applied to a common scenario. Over the years, my family and I have used various cable/satellite platforms. And with each change, there is new technology and new remotes. If you haven't change providers, you might have noticed that it becomes difficult to navigate the TV when you are at another person's house.

So, imagine this scenario. Your city has decided that they will only allow one provider – and it isn't your current provider.

In our first example, the city made the decision without asking your or your neighbors for feedback. They also only gave you a few days notice, and when it is set up, the installer sets it up and then leaves.

Imagine how you are feeling. I'd imagine there is a lot of frustration, confusion, perhaps the desire to throw your TV out the window or cut your cords altogether (in other words, find a way around using the technology).

This example is a poor execution of change management.

CM in Real Life – the cable TV example

A new cable provider is selected for you:

- ☐ You and others were surveyed on the best choice
- ☐ Given months to prepare and learn about it
- ☐ Installers sets it up then offers you a quick crash course on the new system
- ☐ The city and provider follows up with you and asks for your feedback.



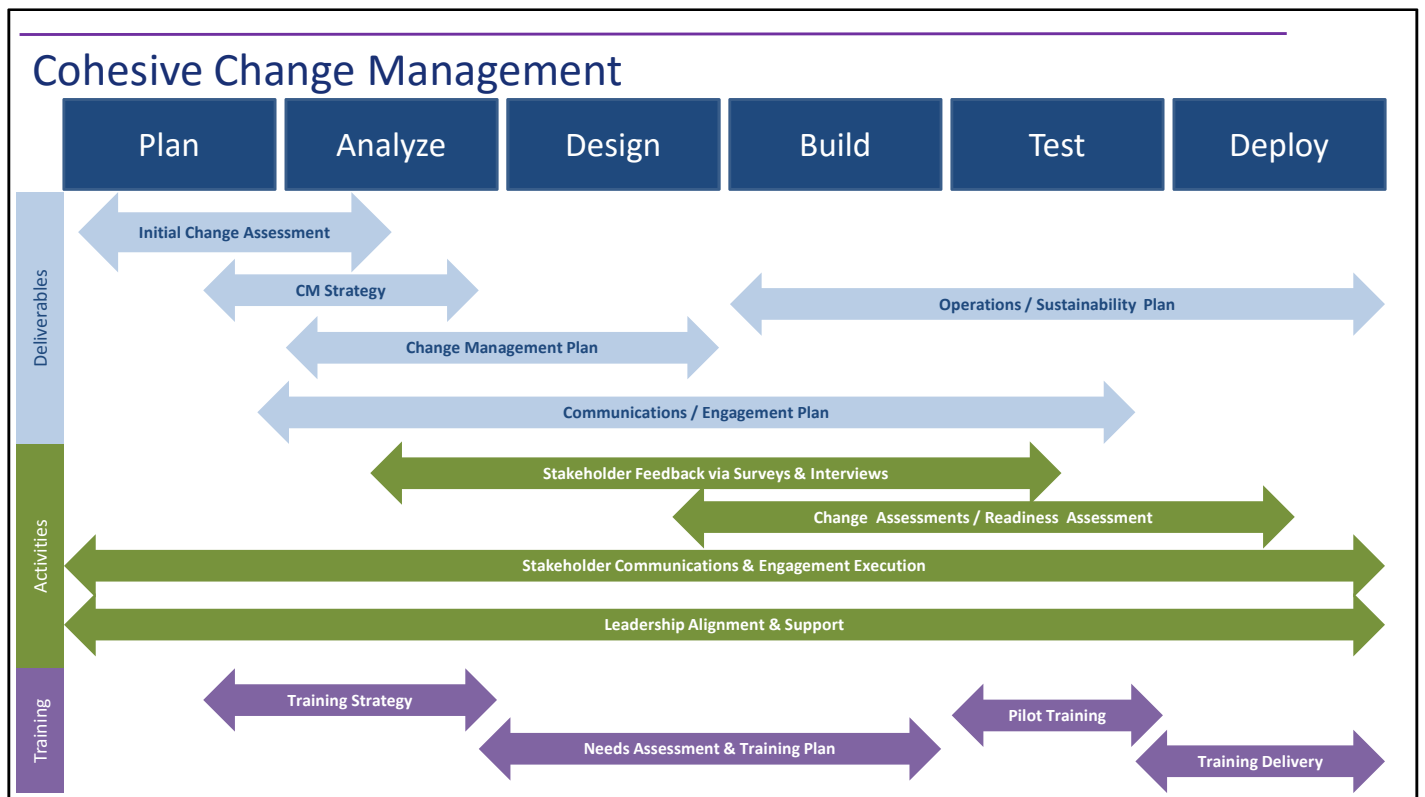
Happy TV watching!!!

So, revisiting our scenario, what are some ways to avoid the frustration and cord-cutting?

- First, creating buy-in early by asking you and your neighbors what they wanted to see in their tv programming.
- Second, communicating early is key and giving you and your neighbor time to absorb the change will produce less consternation.
- Also, tied to that, the City could provide demos and short videos and training to make sure that you and your neighbors are comfortable with the new system before it's installed.
- In this scenario, by the time the installer comes, you are ready to use the new system and know about all the new features.
- After he leaves, as you are snuggled on the couch to binge watch your favorite program, with popcorn of course, you get a phone call with a brief survey asking your thoughts on the installation and the system. Wins all around.

The Elements of Change Management





This slide highlights the key components and activities of our change management methodology.

Our methodology is integrated with our proven project management MomentumMethodology. Change is managed from the beginning of the project until well after the go-live. We have change management professionals who not only know Maximo, but were also Maximo users in our previous careers. We were you – impacted by the changes with upgraded systems and responsible for training new employees. Because of this, we understand the end user perspective and bring that to the table during the project, especially during the workshops and when solutions are recommended. We, in this way, act as the advocate for the end user.

Our change management professional will help empower you make the transition as seamless as possible for your employees, but how do we do this?

What should you be doing?



1. Be flexible. Assess and adjust.



Project managers take heed.

Albert Einstein said, “The measure of intelligence is the ability to change.” Stephen Hawking took that idea even further and said, “Intelligence is the ability to **ADAPT** to change.”

It’s true, the plan is the plan is the plan – until it isn’t. And whether you are PM or on the advisory board, it is crucial that you not be too rigid in your plan. Be intelligent and realize that you have to adapt as you gather more inputs.

As we discussed earlier, our job is to assess the stakeholders, but assessment without action will almost always spell disaster. So, while planning is essential, we must always adjust and adapt that plan based on feedback we receive.

Working with a recent client, we received feedback directly from the front line users that many were uncomfortable or lacked computer skills. So, instead of ignoring their requests, we found a way to work computer literacy training into their overall Maximo training. By the time they got to Maximo training, they felt comfortable using a computer and could focus on how to use Maximo to do their job.



2. Know the business, the people, and the project.

We just talked about adjusting based on assessments. But what questions should you be asking during your assessments? In our assessments, we focus on a few factors:

1. We focus on the organization's history with similar projects.
2. Secondly, we focus on the change capacity of the organization. That is just "change speak" for assessing what other projects or competing initiatives are going on at the same time. Is the implementation happening during a big financial system upgrade? Is it time for end-of-the year close-out?
3. Third, we focus on the level of sponsorship.

Once we have assessed the organization, we can start getting personal. We work to answer common questions: What's in it for me? Will I win or lose? Do I have to learn new skills? Do I have the time or how will I find the time? Can I do it?

We do all this through communication and engagement, but we have to be careful to avoid a few common pitfalls:

1. Communicating using the wrong medium
2. Communicating using the wrong sender

For IT Professionals: It helps if you find time to get out in the field and interact with the users of the system so that you can understand truly what their needs are. A competent change professional should be helping you bridge that gap.

POLL

How often have you experienced the “Monday e-mail for Tuesday training for Wednesday go-live” approach to change?

Thinking of your prior Maximo or software implementations, [read the poll question].

Answer choices:

All the time.

Very often.

Sometimes.

Rarely.

Never.

3. Change management from the beginning... not mid-project.



So often, my job is explaining to people what I do. And, while I love doing it, I am sometimes explaining it as they are deciding what they want to cut from the project. Recently, these conversations are few and far between, as more companies are recognizing that change management is a key component of any successful project not just an add-on. So now that they know they need change management, many don't see the need to bring change management professionals on-board until mid-project. This is a mistake, and leads me to tip #3: make sure you are considering change impacts and involving a change management resource and your sponsors from the project kick-off.

This allows us to have the full context and to start assessing the stakeholders early before the project gets going and gets busy. Because our change consultants are familiar with Maximo, we play double-duty in workshops. We help with requirements gathering, but we can also act as usability experts. As solutions are discussed, we can make sure that the solutions are not only easy to implement, but, more importantly in most cases, easy to use and understand by the users.

Also, remember that change management should be owned by everyone impacted and involved in the project. That is why it is important to involve your sponsors and the impacted stakeholders as early as is feasible. You can even get them involved before a potential project to ask them for their suggestions for improvements of the system. Early involvement leads to ownership of the system. It goes from a system someone else built to a system they helped create.

4. Create ownership through multiple training opportunities



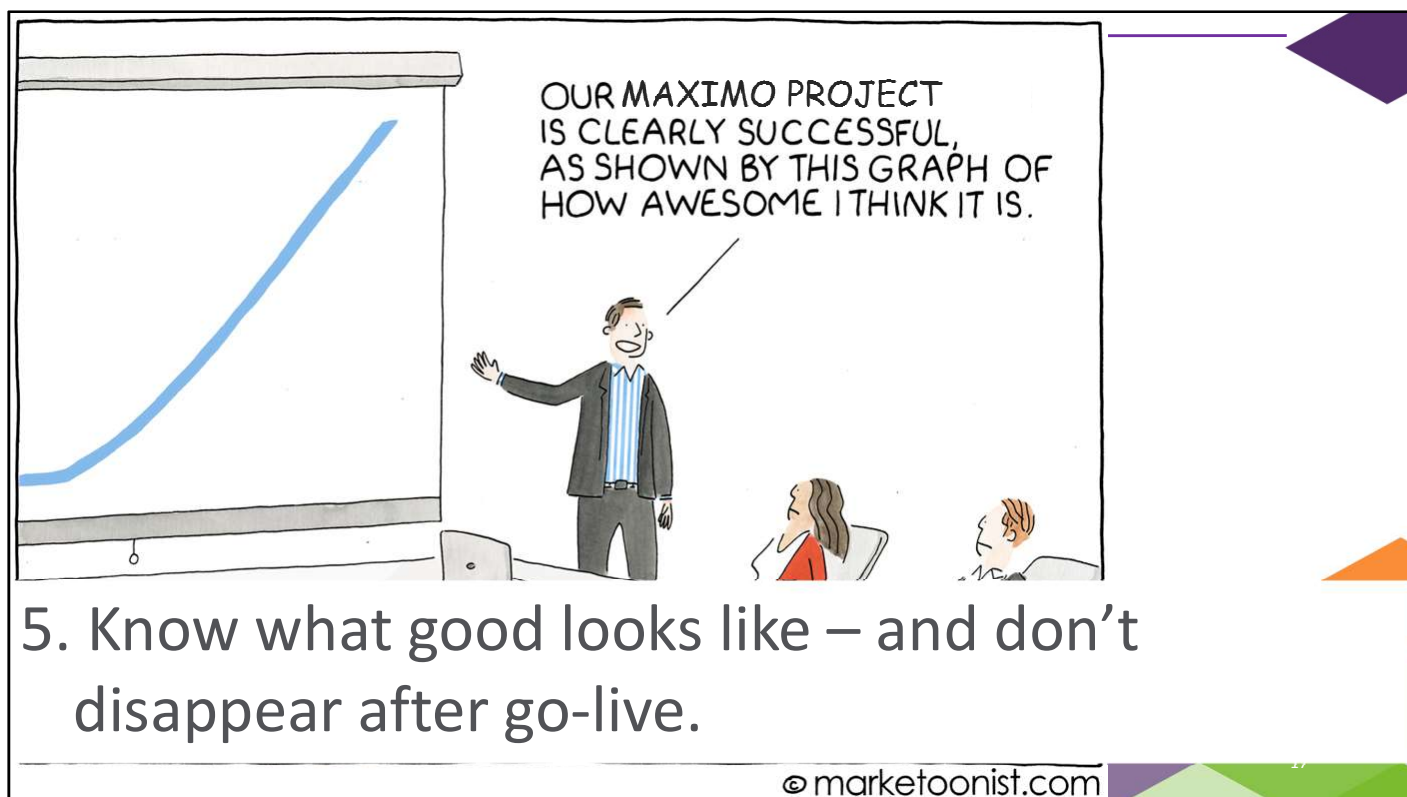
Speaking of ownership, how you choose to deliver training can create ownership of the system as well.

Whenever we are doing a “greenfield” implementation or even an upgrade, we always include multiple training opportunities in our training plan. The worst thing you can do to your users is to only offer classroom training right before go-live.

1. First is Sneak Peek training sessions. General Navigation and Searching in Maximo are taught months ahead of go-live (typically during the last stages of the build phase or the first stages of the testing phase).
2. Second is Pilot Training. We typically offer Pilot Training sessions as our pre-user acceptance training sessions. We can then use this feedback to tweak the go-live training that we offer to the larger user population ahead of go-live.
3. Last, and I mentioned this before, is computer literacy training. Now, on every project, I make sure we survey our end users to find out what additional support they may need beyond Maximo role-based training – and we make sure they get it one way or another. This eliminates the pressure when they have to learn how to do their job in Maximo. They can focus on what they need to learn instead of focusing on everything don’t know.

Like I said, the goal is OWNERSHIP, not just buy-in

Finally, make sure that you accommodate all users. Go to them if possible. Schedule multiple sessions around their working hours, not just 8-5. And bring snacks and food.



5. Know what good looks like – and don't disappear after go-live.

I recently wrote a blog post asking what does 'good' look like? Preferably before you start your next Maximo project, you should be asking yourself the same questions. Good looks different for different organizations and for different departments within an organization.

Once you know what good looks like, measuring good becomes important. We want qualitative and quantitative measures

So, how do you measure good. Through KPIs and performance management. Our Propel Performance Management system can help you measure good. It is designed to bridge the gap between execution and strategy, ensuring that your Maximo project hits all the goals that were expected.

So, it's important that once the project is over, you are still looking for continuous improvement opportunities and that you don't disappear after the go-live. Your users will need constant reminders and validation after Maximo is live. And you will also want to act on the information you are measuring. Propel lets you do all of that in a very collaborative and real-time way.

Remember, often the closer you are to a project, the further you are away from the end user community – so it's imperative to measure and to not disappear. A successful project does not always mean success to your end users.



BE POSITIVE

At the beginning of the presentation, I promised you a bonus. My bonus to you is to bring your most positive attitude to your next Maximo project or initiative. Regardless of the role you play within your organization or within the project, you are a leader in some way. And, just like safety is everyone's responsibility, so too is change management. And attitude and coming to peace with the change is the first step on a long road to project success.

I want to open it up for questions, but first, I want to truly thank you for attending this webinar. If you can't tell, I am pretty passionate about change management and Maximo. And I hope that you have found something useful during this last hour.



Q&A



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