

regoUniversity 2018

# Organizational Change Management | Best Practices

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# Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



# Setting the Stage

What do you think of when I say “Organizational Change Management”?

# Our Experience



**"I want you to find a bold and innovative way to do everything exactly the same way it's been done for 25 years."**

# Our Experience

- Everyone Wants Change: Different process, Different tool, Different job – BUT, not many people are good at accepting and adapting easily.
- IT folks in particular say they do not need all of that “fluff” change stuff – but they need it as much as any other organization.
- Change is always around us – new leadership, new problems, new staff, etc.
- Change is stressful to everyone – and they need help dealing with it.

# Goal of Change Management

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- To enable individuals to adopt new values, skills, and behaviors so that business results can be achieved for the organization as a whole.

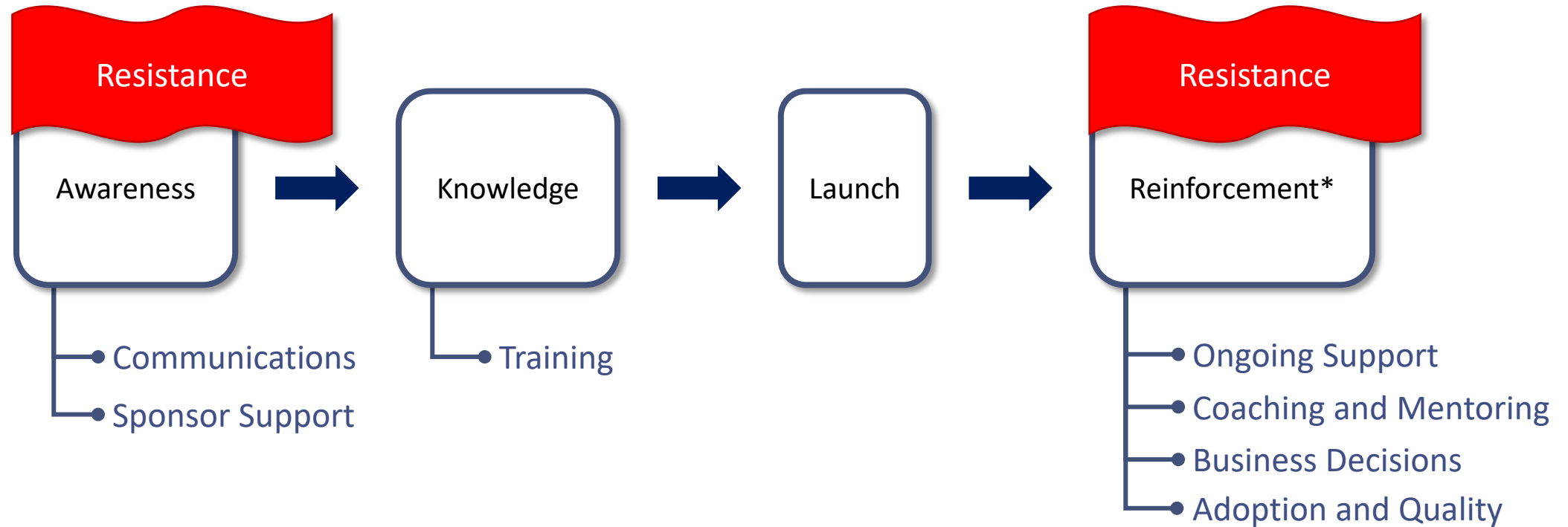
**It is fundamentally about people.**

*Change Management, Jeffrey Hiatt and Timothy Creasey*

# OCM Framework

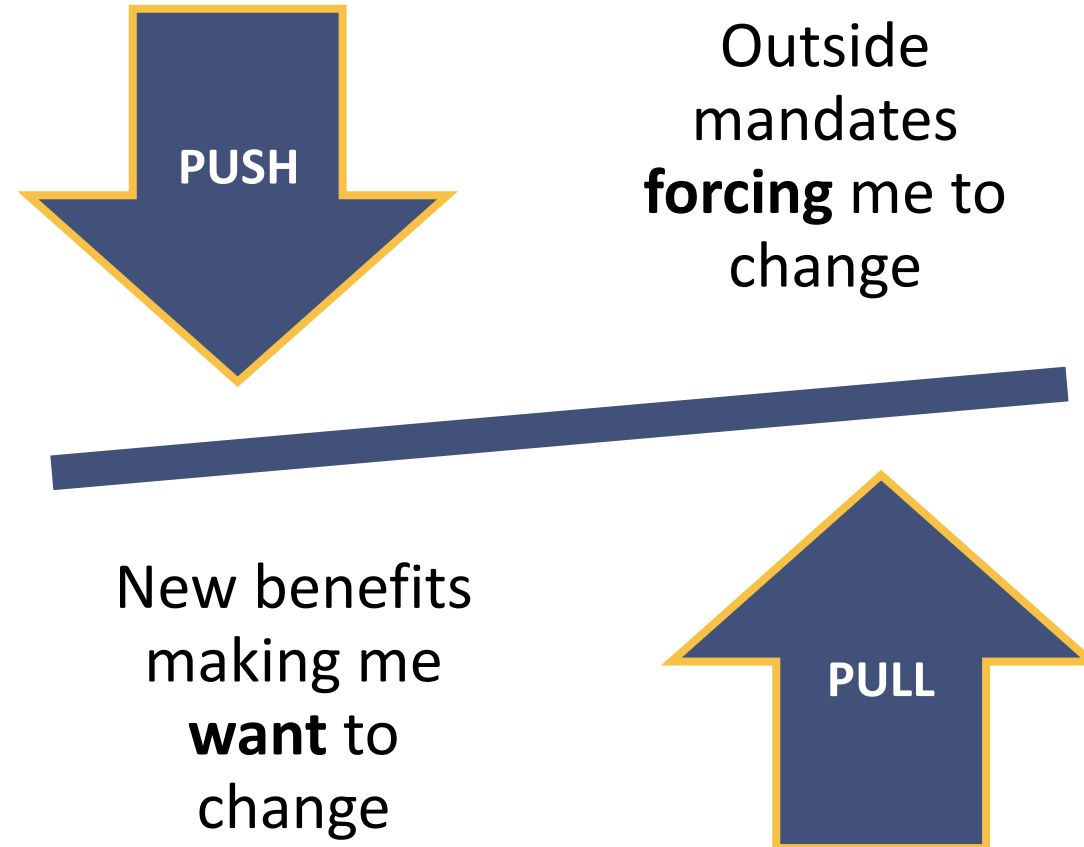


# Change Management Steps



*\* See Appendix for ideas*

# Change Management Factors



# Push

## Common Points of Resistance

- *Another* mandate from above?!?
- More work for me and I'm already busy.

## Ideas to Reduce Resistance

- Outline decisions that will be made from CA PPM on the executive level and how their effort inside CA PPM helps that decision-making process.
- Highlight the data being utilized and decisions being made (transparency).
- Lowest possible impact to end user's daily life.
- Show the roadmap as a *bigger picture*.

# Pull

## Common Points of Resistance

- The tool is too difficult to use
- If I have to do something more or something different, what's in it for me?

## Ideas to Reduce Resistance

- Beyond functional training, show how the tool makes my job better (quality)
- Beyond functional training, show how the tool makes me do my job faster/ easier (efficiency)
- Show the roadmap as a *journey*.
- Establish a **Core Team** for each area affected by changes - listen to your end users on what's working, what's not, and address those issues! Core Teams are often the main input point to the CA PPM Product Backlog.

# Remember...

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**In the long term, PULL is more powerful than PUSH**

**PUSH without PULL = recipe for low to no adoption**

# Top Focus Areas

Going in, know these areas need extra attention OCM-wise:

1. Updating allocation information (either RM or team members).
2. Keeping project data current (dates, RYG, Cost Plans, ETC).
3. Timesheet submission and approval.
4. The old way of doing things slipping back into the process (which may/may not be ok).

# Open Mic

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What challenges does your company have around adopting change when it comes to CA PPM process or features?

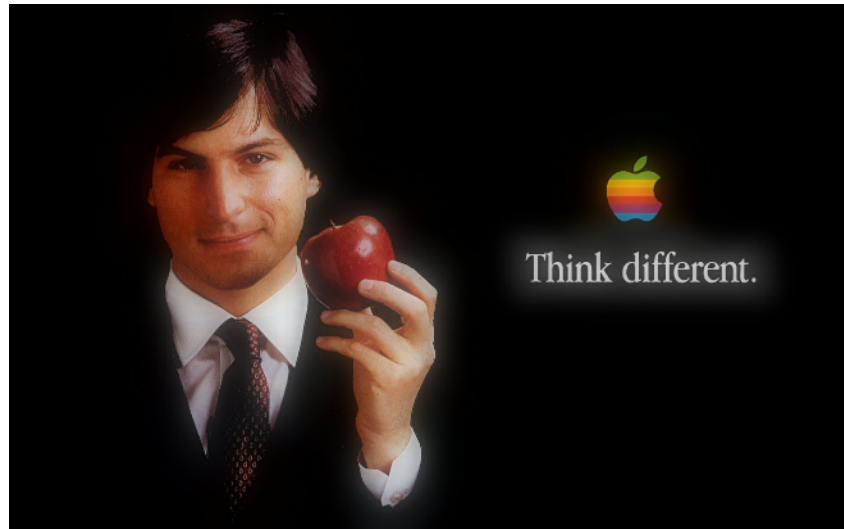
How have you addressed those challenges?

# Tips and Tricks



# Name Recognition

People default to what they hear...



# Have Some Fun

Real theme examples...



# Personal Mentoring

- Embrace the Hate – Emotional Reactions
- Mentor to Improve the Process



# Short and Long Game

Balance Between Quick Wins and End Game (Vision)...



# Focus on the Value

You Must Show Value to People...



# Summary

- People Still Have to Change – No Silver Bullet
- You Can Soften the Impact



# Questions?



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# Appendix

Tools For Reinforcement

# Tools for Reinforcement (1)

## Ongoing Training - monthly

- New Hires: Set the tone, proper formal training
- Existing Staff: topical reinforcement (e.g. RM Training)
- Reinforce Awareness messages around WHY and VALUE

## Coaching and Mentoring

- Lunch and Learns
  - Mini topical reinforcement (e.g. how to configure a portlet)
- Mentoring
  - **Contextual** support via office hours or desk drive-by's
- Office Hours
  - **Contextual** learning – bring your real-world questions to an expert in the trenches with you

# Tools for Reinforcement (2)

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## Business Decisions

- Portlets and Reports: show what executives see and use
- Portlets and Reports: show what end users can use to make business decisions

## Compliance and Performance

- Adoption reporting
- Quality reporting