Part 1: Key Milestones of a New CM Journey
Prosci Webinar



Is there a typical change management journey?

What does it look like for other organizations?

Are we 'normal'?

# Key Milestones of a New CM Journey
## Prosci Webinar Slides

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## Webinar Agenda

| | |
|---|---|
| **F** Key Milestones of a New Change Management Journey | **Introduce Finesta Financial** |
| | **Need Identification** |
| | **Build Individual Competencies** |
| | **Lessons Learned and Next Steps** |

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## Introduce Finesta Financial: Sample Company

FINESTA
FINANCIAL LLC.

Finesta Financial LLC ('Finesta') is a fictional company used by Prosci as a **sample company**.

The fine print: All scenarios, people, and roles represented are fictitious and were created to describe typical challenges faced when managing change and the decisions and actions that could be taken to address them.

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## Introduce Finesta Financial:  Company Profile

**Finesta Financial** specializes in innovative services to plan and fund a company's growth strategy; especially to global markets.

- Founded 2000 (Public)
- 15,000 employees
- Locations:  Chicago (HQ), London, Hong Kong, Sydney

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## Need Identification:  Current Challenges

- **Risks and opportunities** with an underlying theme of **'organizational agility'** which was defined as "the capability to rapidly change or adapt in response to changes in the market"

- **Key projects and initiatives** have **not produced the desired results** and had to be reworked or delayed due to poor adoption and challenges in benefit realization

- A **drop in employee morale** coupled with management frustration impacting organizational culture

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## Need Identification: In the Words of the CEO

*"I am asking my leadership team and everyone in the organization to make agility – **our ability to change quickly and effectively** – a priority and to define specific actions we can take in every aspect of our business to be able to adapt quickly to client needs now and in the future."*

*– Liam Goodman, President and CEO*

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## Need Identification: In the Words of the PM

*"Project management is a mature discipline at Finesta. Our primary drivers are finishing projects on time and on budget so we can move on to the next project in the portfolio. Individual and team KPI's are focused on project delivery."*

*– Sam Cantu, Director of Project Management*

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## Need Identification:  In the Words of HR

*"Our recent employee engagement scores are down.  We've always been at the top of our industry, but  lately employees are feeling anxious and overwhelmed and are unable to bring their best effort to their job."*

*– Mary Mucci, Director of HR*

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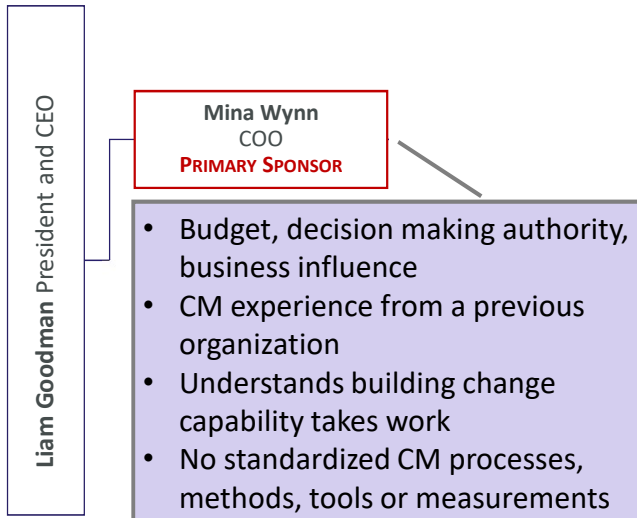
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## Need Identification:  Common Theme

### Key Finding

Finesta had no defined approach for how to introduce change successfully – a situation that caused concern at the top level of the organization.

## Need Identification:  Accountability for Results

**Liam Goodman** President and CEO

**Mina Wynn**
COO
**PRIMARY SPONSOR**

- Budget, decision making authority, business influence
- CM experience from a previous organization
- Understands building change capability takes work
- No standardized CM processes, methods, tools or measurements

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## Need Identification:  A New Role
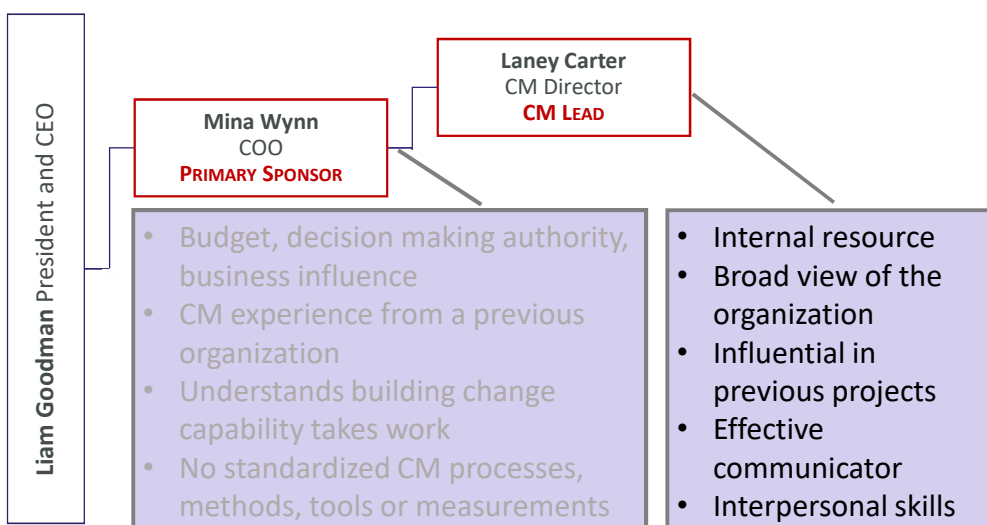
**Liam Goodman** President and CEO

**Mina Wynn**
COO
**PRIMARY SPONSOR**

**Laney Carter**
CM Director
**CM LEAD**

Laney Carter

CM Director

- Budget, decision making authority, business influence
- CM experience from a previous organization
- Understands building change capability takes work
- No standardized CM processes, methods, tools or measurements

- Internal resource
- Broad view of the organization
- Influential in previous projects
- Effective communicator
- Interpersonal skills

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## That sounds way too easy.



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### New CM Journey Checkpoint #1: Key Milestones

| Identified Need | Champion | CM Resource(s) |
|---|---|---|
| Why change management? | Advocate for and support CM | Existing or new CM role |

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# Key Milestones of a New CM Journey
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## Need Identification: Demonstrate Change Success

Liam Goodman President and CEO

Mina Wynn
COO
**PRIMARY SPONSOR**

"Demonstrating change success and delivering measurable results on a strategic initiative is critical."
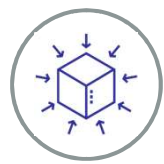
Project Overview:
Client Insights 360
(CI/360)

Year 3: Innovation

Year 1: Information

CI/360

Year 2: Insights

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## Need Identification: Knowledge Transfer

Research-based

Holistic

Easy-to-use

**WHY CHOOSE PROSCI**

Your Partner for Building
Change Management Capabilities

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## Need Identification: Global Change Partner

Chicago/HQ (8,250)

London (3,900)

Sydney (900)

Hong Kong (1,950)

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Change Management Capabilities

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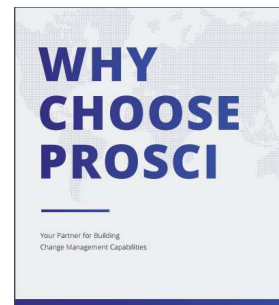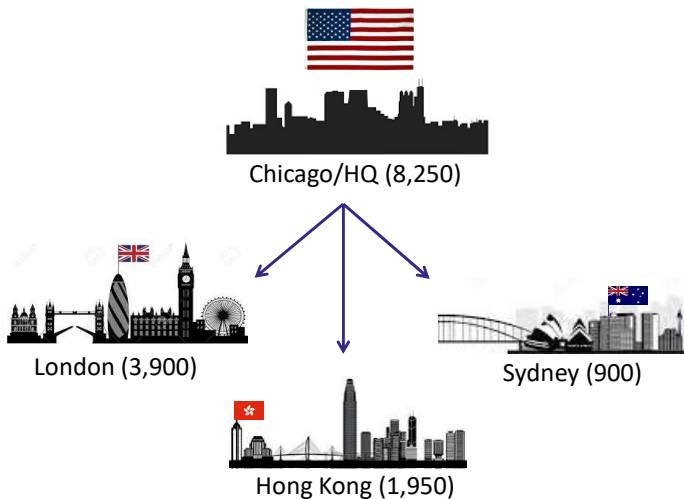
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## Build Individual Competencies: Prosci Certification

**Liam Goodman** President and CEO

**Mina Wynn**
COO
**PRIMARY SPONSOR**

**Laney Carter**
CM Director
**CM LEAD**

**Paul Ross**
VP Global Client Services

**Regional Client Services**
Chicago, Hong Kong,
London, Sydney

**Camille Harris**
Client Experience Lead
**SME**

**Chen Li**
Chief Information Officer
(CIO)

**Sam Cantu**
PM Director
**PM LEAD**

**Rachel Hogan**
VP Enterprise Information
Services

**IT Groups**
Solutions, Support,
Infrastructure

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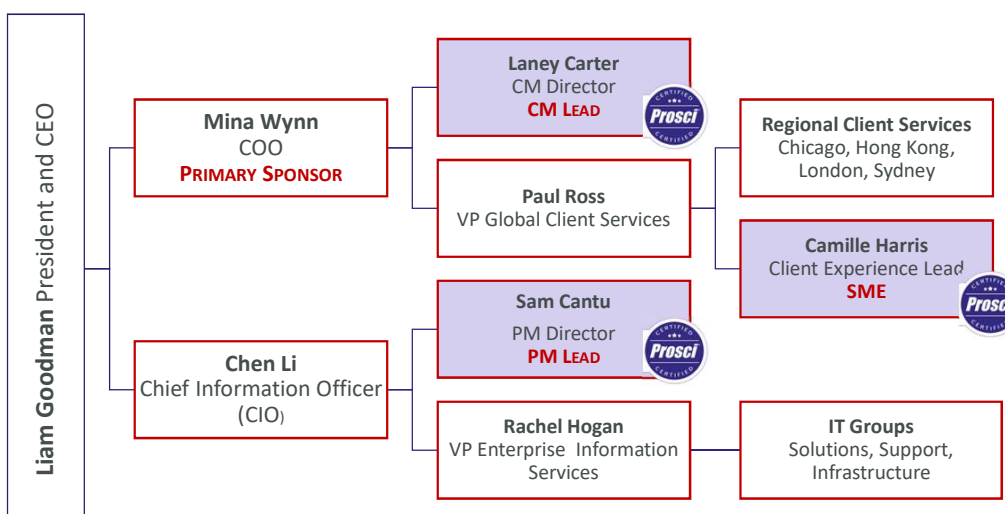
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## Is that typical?

Yes, most Prosci clients start their journey with practitioner certification.

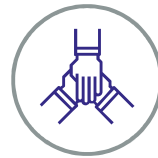---

### New CM Journey Checkpoint #2: Key Milestones

| Project Application | Partner Selection | Practitioner Certification |
|---|---|---|
| Demonstrate success on a project | Why Prosci? | Foundational knowledge and skills |

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# Key Milestones of a New CM Journey
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## Build Individual Competencies: Role Expertise

**Sam Cantu**
PM Director
**PM LEAD**
*Prosci Certified*

Technical Side →

Design
Develop
Deliver

**Camille Harris**
Client Experience Lead
**SME**
*Prosci Certified*

| Current state | Transition state | Future state |

**+** **=**

**Results Outcomes Success**

**Laney Carter**
CM Director
**CM LEAD**
*Prosci Certified*

People Side →

Embrace
Adopt
Use

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## Build Individual Competencies: ADKAR Model®

**Individual**

**A** Awareness

**D** Desire

**K** Knowledge

**A** Ability

**R** Reinforcement®

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# Key Milestones of a New CM Journey
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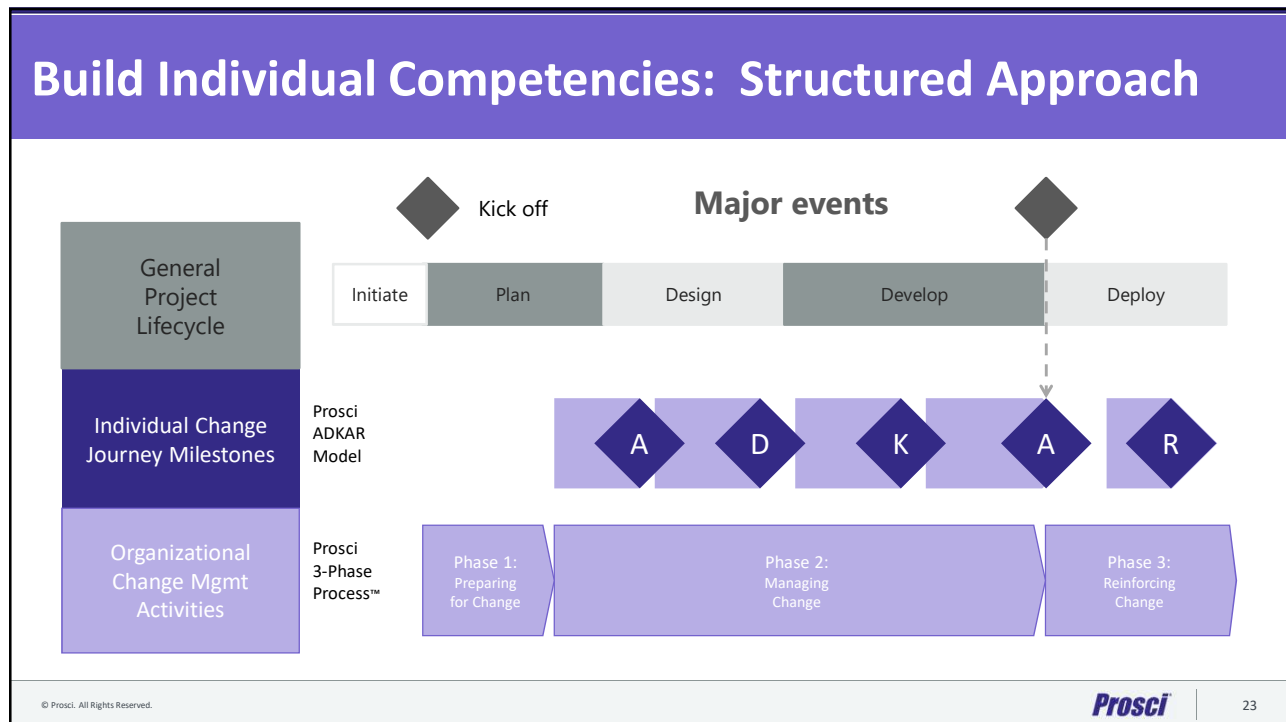


**Build Individual Competencies: Structured Approach**

Kick off • • Major events

| | Initiate | Plan | Design | Develop | Deploy |
|---|---|---|---|---|---|

General Project Lifecycle

Individual Change Journey Milestones — Prosci ADKAR Model — A D K A R

Organizational Change Mgmt Activities — Prosci 3-Phase Process™

Phase 1: Preparing for Change
Phase 2: Managing Change
Phase 3: Reinforcing Change

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**Build Individual Competencies: Sponsor Competency**

**Key Prosci Research Finding**
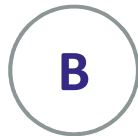
Active and Visible Sponsorship is
the #1 indicator of success.

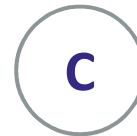## Build Individual Competencies:  Sponsor Competency

### ABCs of Sponsorship

**A**

**Actively** and visibly participate throughout the project

**B**

**Build** a coalition of sponsorship with peers and managers

**C**

**Communicate** directly with employees

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## Build Individual Competencies:  Involve Others

**Laney Carter**
CM Director
**CM LEAD**

**Sam Cantu**
PM Director
**PM LEAD**

**Camille Harris**
Client Experience Lead
**SME**

Gaining sponsor buy-in first with Mina Wynn (Primary Sponsor).  Engage Mina to take the message to Liam Goodman (CEO).

Follow Prosci methodology on the CI/360 Project

Review Finesta PM methodology and integration points with CM with the project team.  Define milestones and deliverables.

Demonstrate results on the CI/360 Project

Take the lead on solution design working with the CI/360 Project team with a view toward 'designing for adoption'

Integrate CM into all CI/360 Project phase gates

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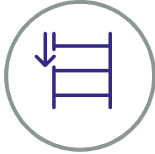
**What if I don't have a team?**

Start where you can, do what you can do, influence others by demonstrating results.

## New CM Journey Checkpoint #3: Key Milestones

| Role Definition | Internalize ADKAR | Apply Methodology |
|---|---|---|
| Who does CM? | Individual Change Model | Prosci 3-Phase Process™ |

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## Lessons Learned and Next Steps

**FINESTA**
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**Finesta Financial** is developing their CM plan and budget.

- A champion with a vision and influence smooths the path
- Learn and apply the methodology to drive 'ability' (proficiency)
- Cultural and systemic challenges will surface (mindset and toolset)
- Demonstrated results fuel the effort to continue the journey

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## Milestone Review

| Key Milestones of a New Change Management Journey | | Identified Need | Champion | CM Resource(s) |
|---|---|---|---|---|
| | **#1** | | | |
| | | Project Application | Partner Selection | Practitioner Certification |
| | **#2** | | | Prosci CERTIFIED |
| | | Role Definition | Internalize ADKAR | Apply Methodology |
| | **#3** | | | |

And Then…

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## Choose Your Own Adventure:  Key Milestones

| Prosci Sponsor Briefing | Train-the-Trainer | Strategic Alignment Workshop |
|---|---|---|
| Role as effective change leaders | Internal facilitation of Prosci training | Develop a CM capability strategy |

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**Is there a finish line on a change management journey?**

Are we ever done?

## Tracking your CM Journey: Maturity Milestones

Prosci®
Change
Management
Maturity
Model™

| Level 5 | Organizational Competency | Change management competency is evident in all levels of the organization and is part of the organization's intellectual property and competitive edge | Continuous process improvement in place | Highest profitability and responsiveness |
|---|---|---|---|---|
| Level 4 | Organizational Standards | Organization-wide standards and methods are broadly deployed for managing and leading change | Selection of common approach | |
| Level 3 | Multiple Projects | Comprehensive approach for managing change is being applied in multiple projects | Examples of best practices evident | |
| Level 2 | Isolated Projects | Some elements of change management are being applied in isolated projects | Many different tactics used inconsistently | |
| Level 1 | Adhoc or Absent | Little or no change management applied | People-dependent without any formal practices or plans | Highest rate of project failure, turnover and productivity loss |

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**Part 1: Key Milestones of a New CM Journey**

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# Prosci®

## PEOPLE. CHANGE. RESULTS.

**Part 2: Outcomes Achieved through Change Success on a Must-Win Project**

Wednesday, October 11 at 11 a.m. EDT (*UTC -4*)
Thursday, October 12 at 4 p.m. EDT (*UTC -4*)