Introduction to OCM in Technology Projects and ACMP in Tallahassee

June 3, 2024

Agenda

- Introductions
- What is Organizational Change Management?
- OCM Standards and Alignment with PMI.org
- ACMP Global and ACMP Florida Chapter Overview
- Partnership Goals
- Next Steps

ACMP Florida Leading the way change works & Project Management Institute. Tallahassee, Florida

Introductions

ACMPFlorida Leading the way change works & HR Florida

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What is Organizational Change Management?

- OCM refers to a series of activities that are conducted to address the people side of a change initiative

- It promotes ongoing employee/stakeholder adoption by conducting ongoing engagement, customized change management plans, and reusable tools to assist with successful long term results. Done correctly, OCM assists with reducing the level of disruption in organizations to the changes in the way work is done while maximizing the positive effects of these changes.

- It is all about helping employees and other stakeholders successfully adopt a new normal, and it's incremental to the success of any type of business pivot and is a key component of any technology adoption project

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What is Organizational Change Management in Technology Projects?

- Digital transformation is all about organizational change

- At its core, digital transformation is about changing the way your organization does business in order to better compete in the digital era. This means adopting new technologies, processes, and organizational structures that are designed to help you operate more effectively and efficiently in a digital world.

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What is Organizational Change Management?

OCM Scope Definition

- The following slides define each of the suggested OCM scope components for the common associated activities.

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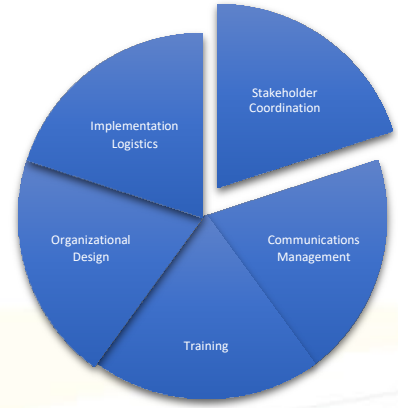
Stakeholder Coordination

Anyone impacted by your changes understand and are engaged with the change. Activities involving stakeholders guide the effort to engage and support those impacted by the change. Leaders in the organizations provide visible change support and serve as role models to their staff. Stakeholder coordination also focuses on maximizing buy-in. Stakeholders include persons or groups who are directly or indirectly affected by a project, as well as those who may have the ability to influence its outcome.



Common Stakeholder Coordination Activities
• Identifying impacted stakeholders and how they will be impacted
• Setting up and engaging Change Champions to coordinate changes impacting their unit's work
• Facilitating strategic planning sessions for impacted stakeholder leadership and providing clear operational guidance
• Gathering information, research and analysis to effectively represent stakeholder values and perspectives
• Understanding roles and responsibilities of different stakeholders and working with each group appropriately
• Disseminating relevant, timely information to stakeholders and receiving timely feedback to make needed updates/changes and collaboratively work toward a successful implementation
• Understanding change impacts and mitigating against and risks and formulating mitigation strategies
• Engage and equip impacted stakeholder leadership l with practical, actionable tools to close the gap between current culture and desired culture

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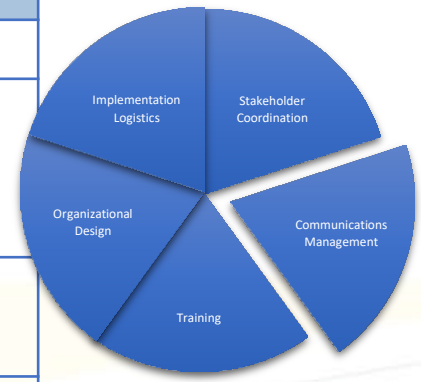
Communications' Management

Common Communications Activities
• Creating and using a Communication Strategy and Plan
• Identifying and analyzing impacted resources to effectively address different stakeholder needs and requirements (e.g., impacted audience, effective modes of communication, etc.)
• Aligning organizational design and implementation, into effective communication to the right audiences
• Working with relevant intra-agency communications' office to coordinate consistent information is disseminated in a timely and organized manner
• Developing communications to all stakeholders to create awareness (vision, purpose, strategy) and promote information to drive adoption of the organizational changes
• Providing accurate understanding of goals and anticipated impact of the project by crafting target messages and associated rationale necessary to effect the anticipated changes associated with the new structure, including benefits included in the changes being communicated
• Collaborating with the Leadership Team and appropriate stakeholders to understand how policy changes should be incorporated into applicable audience messages
• Empowering stakeholders to provide feedback in order to facilitate continuous improvement processes
• Revising communication products based on stakeholder feedback and responses



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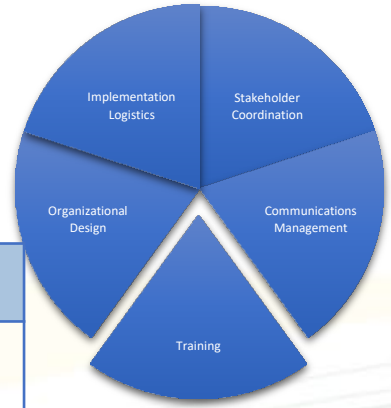
Training

Training focuses on ensuring end users have the necessary knowledge, skills, and abilities they need to transition and

be successful in a new environment. Activities in this knowledge area plan for, build, and implement a role-based training program that allows end users to be better prepared to adopt the new system. Training is crucial to the success of streamlining and modernization efforts. It will include the strategy and approach, development, storage and delivery and knowledge transfer of each FX module's training needs for all identified impacted stakeholders.



Common Training Activities
• Working with teams to identify specific training needs, strategy, approach, work plan and outputs
• Creating and refining training curriculum
• Developing, compiling, and distributing training and support materials
• Delivering training via the various modes identified in the Training Plan
• Reviewing newly defined organizational and system processes, policies, and procedures to aid the development of role-based training curriculum and training material content
• Providing coaching and support to help various leadership levels gain self-awareness, clarify goals, achieve their development objectives, unlock their potential, and act as a sounding board
• Measuring the success of the training approach and delivery
• Updating training materials as appropriate
• Knowledge transferring training responsibilities to Operations once the training and implementation is complete

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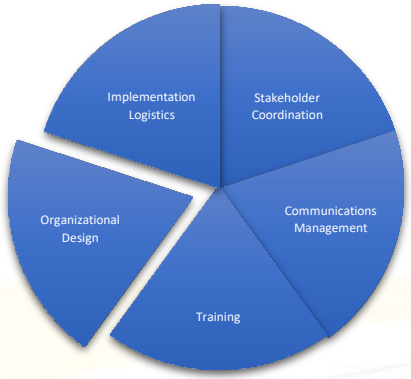
Organizational Design

Supports operational efficiencies/effectiveness. To optimize an organization that supports the changes, it is essential to determine how the structure and workforce will be organized to support business functions in the new environment.



Common Organizational (Re)Design Activities
• Performing an Organizational Impact Assessment to document, in an integrated fashion, the changing aspects (i.e., people, processes, and technology) that will impact the organizational structure and people working within it
• Developing an organization to support the change activities that address updates to organizational work and process
• Defining and implementing the new organizational structure
• Implementing the business process design changes such as work pass- offs, roles, and responsibilities
• Collaborating with the Agency's Human Resource staff to establish processes for staffing changes such as classification levels, job titles, and compensation, as appropriate
• Defining performance measures and quantitative and qualitative outcomes to be used for evaluating the effectiveness future-state operations and service delivery outcomes impacting the Agency unit, function, roles, and staff
• Conducting vendor post implementation operational activities

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Implementation Logistics

OCM Implementation - or business readiness planning - involves the process and activities associated with planning, implementing and controlling the changes resulting from the FX Module go-live. It is the documentation, oversight, support and evaluation of the activities required by stakeholders to successfully accept the changes to their work. The Work associated with this key area entails assessing the business operations' readiness for the impending changes

Common Implementation Logistics Activities
• The development of a Change Readiness Assessment to determine the organization's readiness level for change.
• Developing intervention strategies informed by the Change Readiness Assessment when some fall behind thereby risking the success of a timely implementation
• Accurately define the readiness of staff to accept the impending changes and supporting them through and post the change
• Include a list of activities that will need to be conducted both before and after cutover/go-live to maximize the implementations' success
• Facilitating and documenting organizational considerations/implications and incorporate into pre-implementation readiness activities' checklists
• Identifying, quantifying, and analyzing risks associated with change and design risk mitigation strategies
• Implementing a timeline that set forth a schedule of events, deliverables, and training to create a timeline for activities that need to be done before, during and post implementation
• Facilitate a go-no-go meeting and decision prior to implementation

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ACMP Top Level Processes

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ACMP

Top Level Processes

- The ACMP Standards represent a repeatable set of standard processes and templates developed to ensure consistent change management implementations.

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PMI (v6) and ACMP Standards' Alignment

- The AHCA OCM Standards was developed to align with industry PMI process areas from the Project Management Body of Knowledge (PMBOK) and the Association of Change Management Professionals (ACMP), as well as with FX standards including the FX Project Life Cycle (FXPLC).

PMBOK	Initiating	Planning	Executing	Monitor/Control	Closing
ACMP	Evaluate Impact & Readiness	Formulate Strategy Develop Plans	Execute		Close

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ACMP Global & the ACMP Florida Chapter

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ACMP Global

ACMP's "Why?"

Be the community of change management professionals/practitioners to ***lead the way change works***.

To serve as an independent and ***trusted source of professional excellence***, advocate for the discipline and create ***a thriving change community***.

History

2009 World Café exercise hosted by Prosci.

2011 Association of Change Management Professionals incorporated as a membership organization.

2014 ACMP published the **Standard for Change Management©**.

ACMP established the **Qualified Education Provider (QEP™) Program**.

ACMP established the **Certified Change Management Professional (CCMP™) certification**.

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ACMP Global (cont'd)

ACMP Member

ASSOCIATION OF CHANGE MANAGEMENT PROFESSIONALS®

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ACMP Global (cont'd)

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ACMP Florida Chapter

Mission To lead the way change works in Florida

Vision To grow and connect the change management community through knowledge sharing, collaboration and professional development opportunities

Values

Integrity
We commit to operate with integrity and transparency in the best interest of our membership.

Collaboration
We connect our members to build community and professional acumen.

Innovation
We drive a next generation mindset in research, practice, and delivery.

ACMP Florida Chapter & Project Management Institute Tallahassee, Florida

Partnership Goals

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Partnership Goals

Organization

SMEs

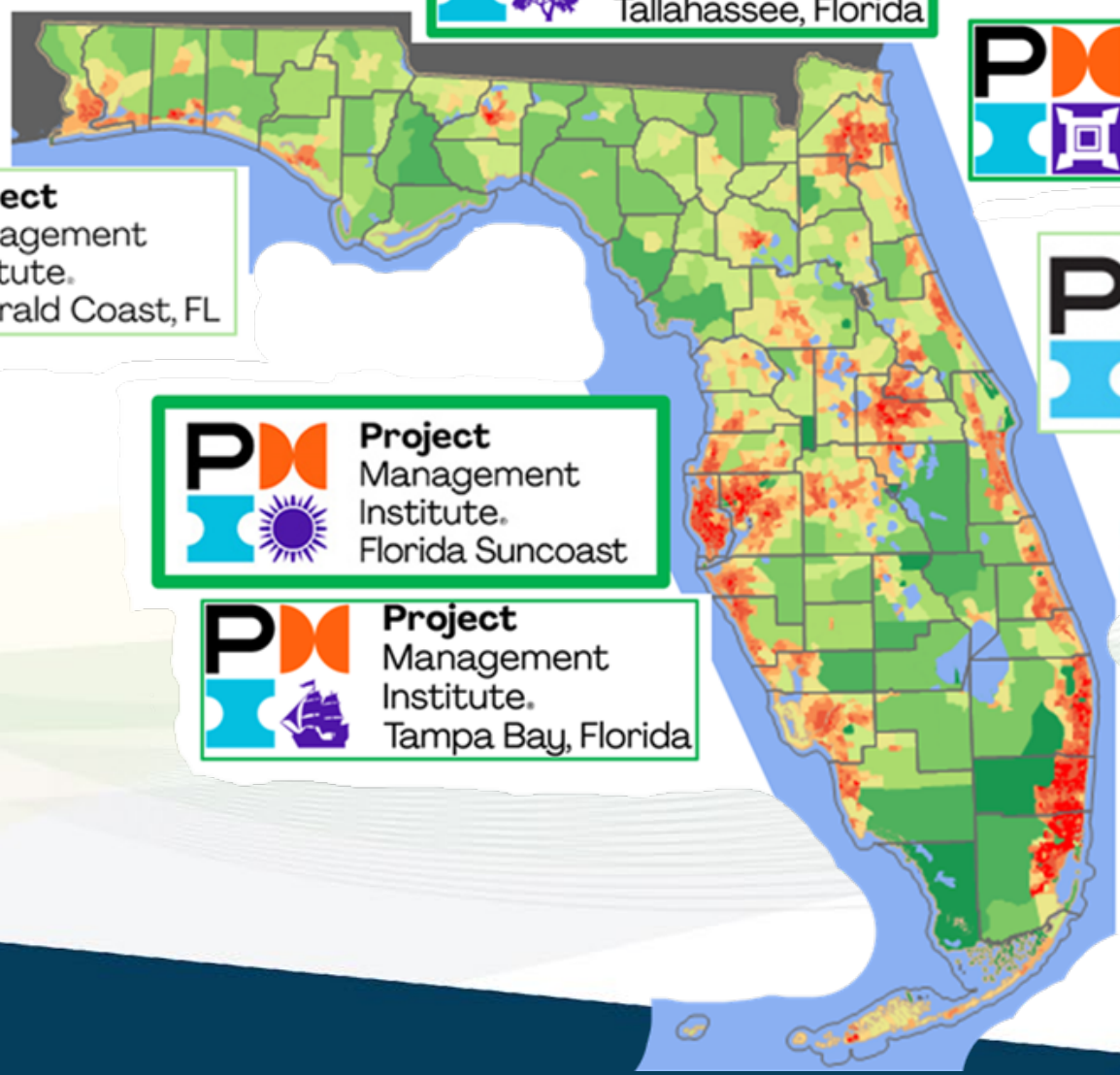
Project Management

Quality Management

Talent/HR Management

ACMPFlorida

Leading the way change works



Project Management Institute. Tallahassee, Florida

Project Management Institute. Northeast Florida

Project Management Institute. Emerald Coast, FL

Project Management Institute. Central Florida

Project Management Institute. Florida Suncoast

Project Management Institute. Space Coast, Florida

Project Management Institute. Tampa Bay, Florida

Project Management Institute. South Florida

Partnership Goals (cont'd)

Joint Events and Workshops

- Conferences and Seminars
- Workshop and Training Sessions

Shared Resources and Knowledge Exchange

- Webinars and Online Learning
- Shared Repository of Articles, Research Papers, etc.

Cross-Functional Teams and Projects

- Task Forces
- Community Outreach Projects

Networking Opportunities

- Joint Networking Events
- Mentorship Programs

Advocacy and Public Policy

- Workplace Policy Advocacy and HR Legislation
- Public Awareness Campaigns

Certification and Professional Development

- Certification Programs
- Continuing Education

Research and Development

- Collaborate Research
- Surveys and Studies

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Next Steps

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Next Steps

1 Establish a Partnership Committee

- Form a **joint-committee** to oversee collaboration efforts and ensure alignment with both organizations' goals.

2 Set Clear Objectives

- Define clear, measurable objectives for the partnership to ensure it delivers tangible **benefits** to members of both organizations.

3 Regular Meetings

- Hold regular meetings to plan **joint activities**, review progress, and adjust strategies as needed.

4 Member Engagement

- Actively engage members in planning and executing joint activities to ensure their **needs and interests** are addressed.

5 Communication Plan

- Develop a communication plan to keep members **informed** about events, available resources, and opportunities for involvement.