



THIRD STAGE
CONSULTING GROUP

Organizational Change Management: Strategy vs. Reality

Introduction

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Third Stage Consulting Group

- 20+ years in ERP and Digital Transformation consulting
 - Big 5 consulting experience
- Founder and thought leader behind Panorama Consulting and other consulting teams
- Competencies: Digital strategy, org change, process improvement, project management, expert witness



Agenda



Intro to Organizational Change

Change Management Toolset

When Does Change Management Occur in a Transformation?

Change Case Studies

Questions

Before We Start...

- What has your organization's experience been with current and past transformations?





What is Organizational Change?

Anything that prepares people for the transformation and drives transformational performance.

Change Is Difficult and Personal

- People are comfortable with what they know
- Forced initiatives make them question things
 - Jobs, Roles and Tasks, Teams, Skills
- People change for their own personal reasons
 - Understand and believe in the new direction
 - Follow orders from leaders
 - Trust peers who are on board
 - Excited to learn something new
 - Problems they're aware of are being addressed
 - Changing enables them to keep their jobs
 - Rewarded (e.g., financially) for changing



Change Is a Journey

Change is a *Journey*, not a program or a workshop, etc. Change occurs over a period of time, often longer than we expect

Common People Challenges

Intentional Resistance

- People are opposed to the changes
- Typically among key stakeholders and influencers
- Sabotage, refusal to accept changes
- Can spread like a cancer if not mitigated

Unintentional Resistance

- More widespread and common challenge
- Harder to detect and mitigate
- Fear of loss, perceived lack of personal value in future
- Comes in the form of watering down the future state vision

Misunderstanding

- Confusion with future state processes, roles and responsibilities, etc.
- Lack of awareness regarding new software functionality
- New roles and responsibilities are not clear

Misalignment

- People, processes, and technology don't align
- Future state does not support bigger-picture corporate goals
- Project execution is incongruent with project vision

Symptoms:

- Refusal to accept changes
- Workarounds
- Too much customization
- Operational disruption
- “Paving the cow paths”

Debunking Common OCM Myths

1

OCM = (TRAINING + COMMUNICATIONS)

2

NEW TECHNOLOGY = TRANSFORMATION

3

CONSULTANTS MANAGE THE ACTUAL CHANGE

OCM Guiding Principles



- 1) Involve all personnel to create organizational ownership
- 2) Drive change from top down and bottom up
- 3) Develop and execute a customized change plan
- 4) Measure effectiveness throughout for real-time adjustments
- 5) Accentuate change-related data specific to the affected
- 6) Drive buy-in through proper documentation of need, benefits
- 7) New environments change how things get done, require new skills
- 8) Always keep people in the loop with what is happening and why

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Intro to Organizational Change



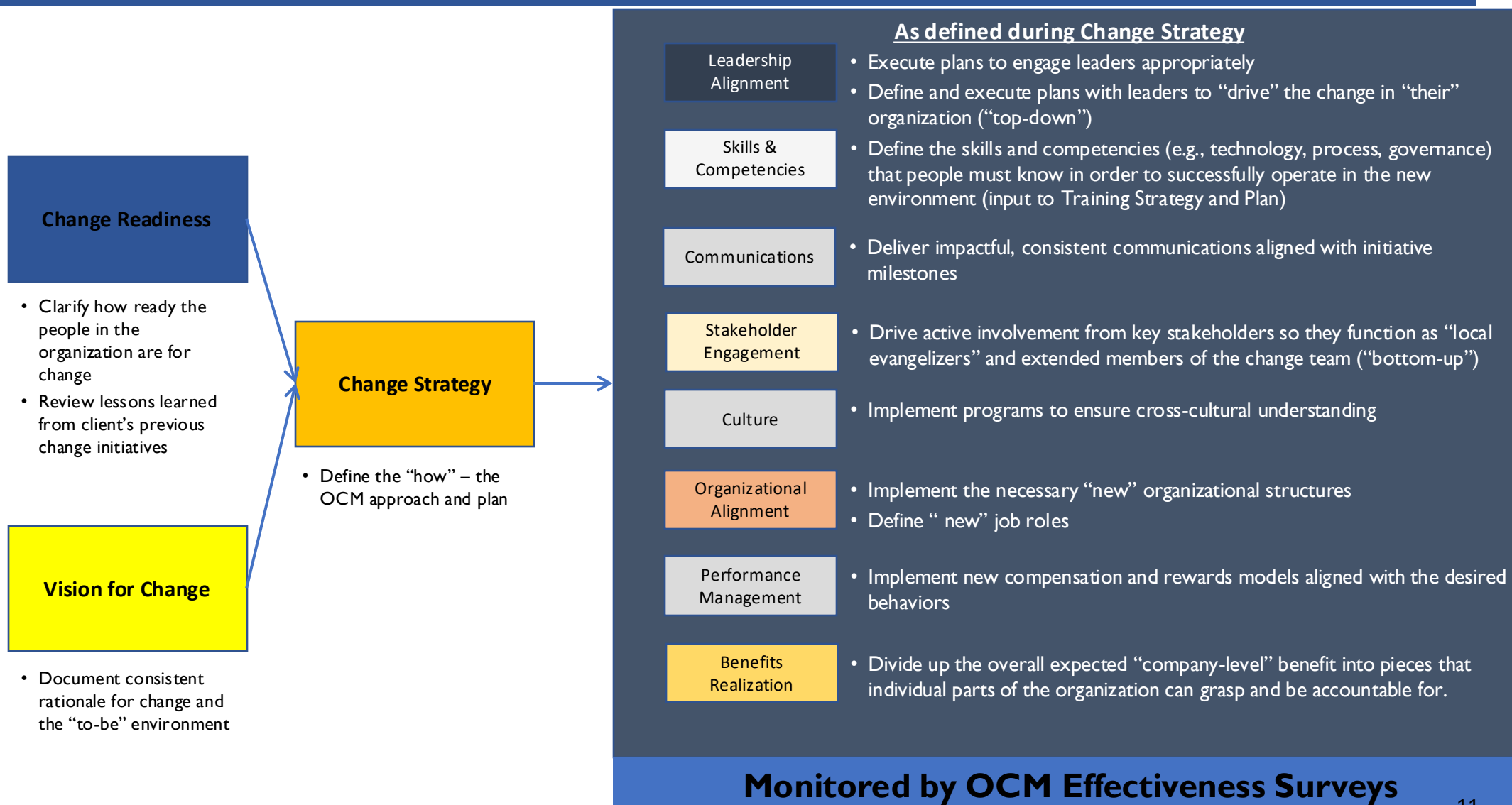
Change Management Toolset

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Change Management Toolset



Change Management Objectives

Assess Organizational
Readiness

Align Executives and
Stakeholders

Mobilize Internal
Change Agents

Develop and Execute
Communications Plan

Assess and Deploy
Change Impacts

Design and Deploy
Organizational Changes

Define and Deploy
Business Process
Improvements

Develop Internal ERP
Competencies and
Centers of Excellence

Build Organizational
Infrastructure to
Support New Processes
and Technology

Customize ERP
Software Training

Train the Trainers

Define and Deploy
Performance Measures

Mitigate Organizational
and People Risks

Optimize Business
Benefits

Audit Post-
Implementation
Results

Change Management Toolset

Organizational Change Readiness Surveys and Analysis

- Identifies “below the surface” employee resistance to change
- Measures severity and root cause of resistance
- Focuses on enabling broad transformation capabilities
 - Identifies areas of focus in developing organizational change strategy and plan
- Conducted early and iterative throughout the transformation



Process:

3. Rate the SAGE Process Transformation (1=Not at all, 5=Very much)

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
1. Processes to be clearly documented on process maps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Process maps to be the process maps and keep them up to date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Process maps to be made available on the internet so everyone can clearly and transparently understand how our process flows in the world	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. The initial process mapping efforts to include process improvement workshops to identify opportunities to improve the process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Future state processes to support and/or provide other than one automation, reuse and conversion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Business maps to be used as the baseline for a continuous improvement cycle to process owner responsibility issues for maps and tool sets to improve them, make changes, and update the maps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Processes to be reviewed periodically and/or on an ad-hoc basis to drive the work-life integration of projects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Processes to be designed to maximize the value to internal customers as determined through Voice of the Customer sessions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Process improvement to eliminate waste/non-value added steps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. How well a leadership team should be willing to embrace more consistent business process standards across the US, UK, and other regions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Technology:

4. Rate the SAGE Process Transformation (1=Not at all, 5=Very much)

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
1. The accounting system to be replaced with a system that is stable, secure, and easy to use	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. The new accounting system to be fully operational by the end of the year	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. SAGE to create and maintain its own data	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. SAGE to be used to manage all data and reports only once, with data	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. SAGE to address current manual processes through the adoption of new	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. SAGE to address current processes and allow SAGE to double in size with	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. How much change our current technology to fit our business processes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. The finance transformation to move from a technology requirement to a business process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Organization Readiness Health Scores

Organization Readiness Health Scores	Project Health
Strategic Clarity and Alignment	3/10
Organizational Clarity	8/10
Culture	9/10
Burning Platform for Change	7/10
Executive Support	3/10
Internal Competencies	5/10
Internal Communications	3/10
Training	4/10
Accountability	1/10
Transformation Agility	5/10
Job Satisfaction	

Strategic Alignment and Clarity

Description:
People on the same page, executives, mid-management and front line employees, and everyone with clarity on roles and project objectives

Key Findings and Observations:

- Most interviewed individuals were not able to articulate the organization's strategy
- Employees typically understand the focus on growth
- Information doesn't filter down to lower level employees very well.

Risks:

- Manifests misunderstanding of why initiatives are occurring
- Elongates decision making when people are not aligned on objectives

Recommendations:

- Reinforce top strategic objectives through project and other organization communication
- Communicate clarity on strategy and filters to all employees
- Tie project objectives to strategic objectives

Readiness Score: **3/10**

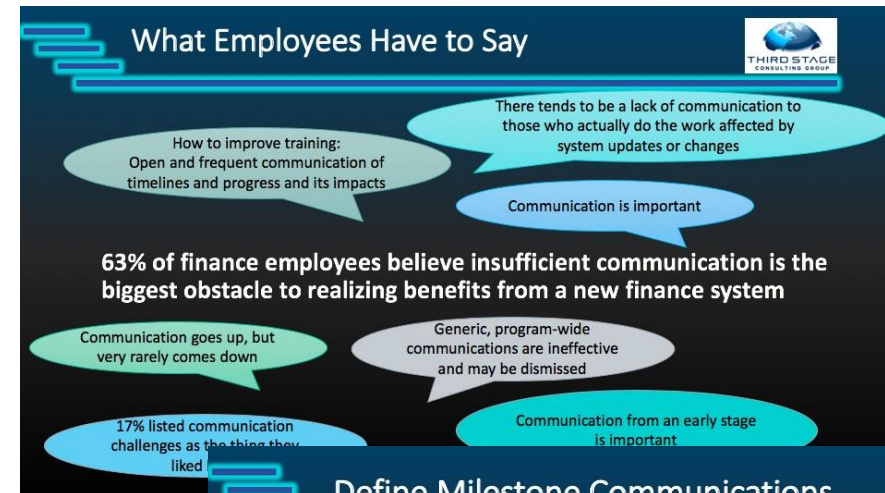
Change Management Toolset

Communications

- Tailored based on findings from organizational change readiness assessment
- Identifies multiple ways to reach employees via a variety of mechanisms
- Aligns with company culture and norms
- Evolves throughout the course of the transformation



What Employees Have to Say



How to improve training:
Open and frequent communication of timelines and progress and its impacts

There tends to be a lack of communication to those who actually do the work affected by system updates or changes

Communication is important

63% of finance employees believe insufficient communication is the biggest obstacle to realizing benefits from a new finance system

Communication goes up, but very rarely comes down

Generic, program-wide communications are ineffective and may be dismissed

17% listed communication challenges as the thing they liked least

Communication from an early stage is important

Define Milestone Communications

Define Stage Milestone	When	Medium	Audience	Message	Desired Outcome
Project Kickoff	Once- As soon as possible	Town Hall	Finance Employees	<ul style="list-style-type: none"> Describe the project and motivation for the project Describe what is included in the finance transformation and what is not included. 	<ul style="list-style-type: none"> Provide clarity to overview of the project Align expectations Answer questions
IT Engaged	Two weeks prior and 1-2 weeks after IT engagement	Scheduled Meetings	Technical team, Core team and SME's	<ul style="list-style-type: none"> Introductions How the teams will work together Education on project governance relevant at this point 	<ul style="list-style-type: none"> Prepare team members to work together Give the opportunity for Q&A Relationship building
Business Architecture complete	Once	Intranet	Finance Employees	<ul style="list-style-type: none"> Project Status/Progress, Definition of Business Architecture 	<ul style="list-style-type: none"> Raise Awareness Begin cascading of information
Systems Architecture complete	Once	Intranet	Finance Employees	<ul style="list-style-type: none"> Project Status/Progress, Definition of Systems Architecture 	<ul style="list-style-type: none"> Raise Awareness Begin cascading of information
Two weeks Prior to Selection Stage commencing	Once	Scheduled Meeting	Technical team, Core team and SME's	<ul style="list-style-type: none"> Explain how the selection process will work Define roles and responsibilities for this stage 	<ul style="list-style-type: none"> Prepare team members for the selection process Give the opportunity for Q&A Identify concerns
Selection Stage commences	Once	Quick and easy to read Email	Finance Employees	<ul style="list-style-type: none"> Project Status/Progress, Explanation of the Selection process and expected length 	<ul style="list-style-type: none"> Raise Awareness Begin cascading of information
SI and Software vendor licenses / subscription contracts signed	Once	Town Hall	Finance Employees	<ul style="list-style-type: none"> Reinforce project motivation Introduce selected vendor and explain why selected 	<ul style="list-style-type: none"> Provide clarity Answer questions
Systems Integrator(s) SoW 1 signed	Once	Quick and easy to read Email	Finance Employees	<ul style="list-style-type: none"> Project Status/Progress, Introduce System Integrator and explain next steps 	<ul style="list-style-type: none"> Raise Awareness Begin cascading of information
Define Phase Complete	Once	Quick and easy to read Email	Finance Employees	<ul style="list-style-type: none"> Project Status/Progress, Celebration 	<ul style="list-style-type: none"> Celebration

Change Management Toolset

Organizational Design

- Defines and aligns the to-be organizational state with the to-be processes and technology
- Pragmatic approach focused on the “hard” side of change
- Identifies specific change impacts for training and communication purposes
- Translates system design into tangible employee business processes and workflows



Organizational Design Model

Ref.	Org. Level	Division / Business Unit	Department / Business Area	Process	Role Title	Description	Role Owner	Role Purpose	Capabilities this role supports	Location(s) of Role	people performing role at this	Key skills required for role	SKILLS qualifications required for role	attribu
ORG.1	<no. of levels down from CEO>	<eg. Finance>	<eg. Accounts Payable>	<eg. Invoice Processing>	<eg. Accounts Payable Clerk>	<the incoming invoices from suppliers and ensure invoices get paid>	<Name of the person accountable for the process>	<e.g. International>						

Change Impact and Requirements Traceability

#	Requirements / User Stories	Immediate opportunity?	ERP Module					Current System	Decisions to be Made	Potential Change Impacts	Other Notes / Issues
			Purchasing	Inventory Mgmt	Core Financial	Project Management	Point of Sale				
POS 1	As a customer, I require the ability to order any merchandise via the website so that I can acquire goods through the channel of my choice	Yes						Website		Addition of maintenance process	Why isn't this the case now?
POS 2	As a contact center user, I need the ability to view accurate, meaningful, and searchable descriptions for all merchandise along with pictures so I can assist customers in finding the items that they would like to purchase	Yes						?		Addition of maintenance process	What is current process to update and maintain descriptions? Any feedback loop?
POS 3	As a retail user, I need the ability to track food inventory so that I can better manage costs and availability	Yes	X	X				X	N/A	Should all food go through full inventory process? How to align MO and PA process on pre-packaged foods?	Retail team likes current process and does not see a need to change - low effort, low impact currently
POS 4	As a retail manager, I need to have a consistent process between locations around managing drink inventory so I can better manage costs	Yes							N/A	Pepsi manages drink inventory in PA - configurable only in PA, in both, or neither?	Retail process around drinks - both teams comfortable with their current approach
POS 5	As a retail user, I need a standard policy for processing returns so that I can serve our customers seamlessly	Yes							N/A	\$ thresholds by payment type, when to escalate	Potential impact to degree of flexibility in satisfying customers
POS 6	As a retail user, I need a clear and consistent approach to handling customer promotion requests that fall outside the standard approach so that I can be efficient									Set policy for handling variations - e.g. 2 friends	Potential impact to degree

Localization Requirements

Version No.	Area	Dimension	Description	Role Group	Requirement	L2 / L3 Process ID	Process Owner	Comments
LOC.1	User Preference	Language	Native support for language	All	UK, US, Taiwan, Chinese, Mandarin, German, French, Italian, Spanish			
LOC.2	User Preference	Date	Date format	All	Local formats, user configurable (dd-mm-yy default)			
LOC.3	User Preference	Decimal	Number format	All	User configurable, decimal point, comma separator & comma decimal			
LOC.4	User Preference	Dashboard	Dashboard widgets on home-screen	Accounts Payable Manager	Dashboard locked by role-type / permissions. Days Sales Outstanding, Unprocessed approvals			
LOC.5	User Preference	Dashboard	Dashboard widgets on home-screen	Accounts Payable Clerk	Purchase Orders unmatched, invoices to be paid			
LOC.6	Customer Documents	e-invoices	Language	All	Local languages and character sets, as per user preference			
LOC.7	Customer Documents	e-invoices	Branding	All	Branding of the respective local legal entity			
LOC.8	Customer Documents	Statements	Language	All	Local languages and character sets, as per user preference			
LOC.9	Customer Documents	Statements	Branding	All	Branding of the respective local legal entity			
LOC.10	Customer Documents	Dunning	Language	Standard	Local languages and character sets, as per user preference			
LOC.11	Customer Documents	Dunning	Branding	Standard	Branding of the respective local legal entity			
LOC.12	Customer Documents	Dunning	Custom	VP	Personalised dunning letter, signed by country manager			
LOC.13	Customer Documents	Dunning	Custom	Corporate	Personalised dunning letter, signed by country manager			
LOC.14	Accounting	Statutory Chart of Accounts	Accounting Standard	UK	UK GAAP			All UK legal entities
LOC.15	Accounting	Statutory Chart of Accounts	Accounting Standard	US	US GAAP			
LOC.16	Accounting	Statutory Chart of Accounts	Accounting Standard	India	India GAAP			
LOC.17	Accounting	Statutory Chart of Accounts	Accounting Standard	Group	IFRS			IFRS 15 applicable to
LOC.18	Accounting	Payment Formats	Support for payments	UK	Support for Swift / CHAPS format payments via HSBCNet			
LOC.19	Accounting	Payment Formats	Support for payments	UK	Support for BACS payments via HSBCNet			
LOC.20	Accounting	Payment Formats	Support for payments	US	Support for wire payments via BoFAMM			
LOC.21	Accounting	Payment Formats	Support for payments	US	Support for ACH payments via BoFAMM			
LOC.22	Accounting	Receipt Processing	Support for Credit Cards	US	Payments via Digital River			
LOC.23	Accounting	Receipt Processing	Support for Credit Cards	US	Payments direct through website payments gateway (WorldPay)			See Interface AMO11
LOC.24	Accounting	Banking	BoFAMM	US	Support for BoFAMM directConnect			All bank account det
LOC.25	Accounting	Banking	HSBC	UK	Support for direct link to HSBCNet			HSBCNet is ISO2002
LOC.26	Legal & Statutory	Financial Statements	Petty Cash Reporting	Russia	Decree Committee of Russian Federation published 18-Aug-1998, N 88 "Unified accounting documentation for accounting of petty cash operations" which describes a set of reports that are legally payable and receivables nominated in a foreign currency should be required at reporting period end.			Application to Russia
LOC.27	Legal & Statutory	Financial Statements	Third party transactions - Revalua	Russia	Lusine Russian Federation Central Bank rates. Realised exchange rate in/loss amounts should be			Application to Russia



Change Management Toolset

Benefits Realization

- Builds internal competencies and long-term sustainability
- Focuses and tangible performance measures, metrics, and KPIs
- Aligns with and enabled by other organizational change activities throughout transformation



Business Capabilities Enablement									
FIN.BCA.01		Date:							
Version:	Date:								
Ref	Business Capability	Application Component / Sub-	Description (what does this capability mean to)	Outcomes (what, at a high level, do we need	Current / Future Capability	Assessment (can we do this today?)	What provides this capability?	In/Out of Scope	Aligned to Process Taxonomy

Process KPIs										
FIN.KPI.01		Date:								
Version No.	Date:									
Nr.	Process #	Topic	Category	Name	Objective	Formula	KPI Frequency	KPI Gr.	KPI P.	Used for
RTR.1	3.2	Transaction Processing	Efficiency	# of journal entries per accounting head	manage the number of entries per defined user and track any volume changes	Number of GL entries / total number of GL users	Monthly	%	PPI	Process P.
RTR.2	3.2	Transaction Processing	Accuracy	% of GL Correction Postings	Minimise the number of correction postings	Monitor number of journal reversals as a percentage of total journals	Monthly	%	KPI	Service M.
RTR.3	3.5	A/C Analysis & Reconciliations	Efficiency	Account reconciliations in time	Track and ensure timely performing account reconciliations	Number of account reconciliations in time / total number of account reconciliations to be performed * 100.	Monthly	%	KPI	Service M.
RTR.4	3.5	A/C Analysis & Reconciliations	Accuracy	Value of Balance not reconciled	Minimise the unreconciled balances and understanding the root cause	Value of accounts not reconciled / total value of accounts to be reconciled * 100	Monthly	%	PPI	Process P.
RTR.5	3.5	A/C Analysis & Reconciliations	Effectiveness	Value of open items as proportion of total GL balances	Minimise the open items balances and understanding the root cause	Value of unreconciled accounts balance/ total value of Account Balances* 100.	Quarterly	%	PPI	Process P.
RTR.6	3.5	A/C Analysis & Reconciliations	Accuracy	Number of Intercompany mismatches	Value of intercompany should be <\$50,000 on consolidation	Consolidated balance of Intercompany Accounts	Monthly	#	PPI	Process P.
RTR.7	3.6	Periodic Processing	Compliance	# Days to complete closing activities	Monitor and Minimise the no.of days necessary to complete the entire closing process according to the Closing Calendar. It is important to track the number of days that is needed to complete the actual closing activities (offset) against the planned days required to complete the closing activities at an aggregate level.	Number days = Completion Date of Closing Activities according to Closing Monitoring Tool -- Starting Date of Closing Activities according to Closing Monitoring Tool	Monthly	#	PPI	Process P.
RTR.8	3.3	Bank/Treasury	Effectiveness	% of open positions on the treasury reconciliation accounts	KPI measures the percentage of open position on treasury reconciliation account (bank/cash/bond/loans clearing accounts)	Value of open items on treasury reconciliation account / Total value of balance on reconciliation account * 100.	Monthly	%	KPI	Service M.
RTR.9	3.3	Bank/Treasury	Effectiveness	Ageing of open transactions on the treasury reconciliation accounts	To monitor items that are yet to be reconciled to determine if items have been processed accurately or if they are cheques awaiting	Same as DSO	Monthly	%	KPI	Service M.
RTR.10	3.2	Intercompany	Effectiveness	Ageing of open transactions on the intercompany reconciliation accounts	To monitor items that are yet to be reconciled to determine if items have been processed accurately or if they are cheques awaiting clearing	Same as DSO	Monthly	%	KPI	Service M.

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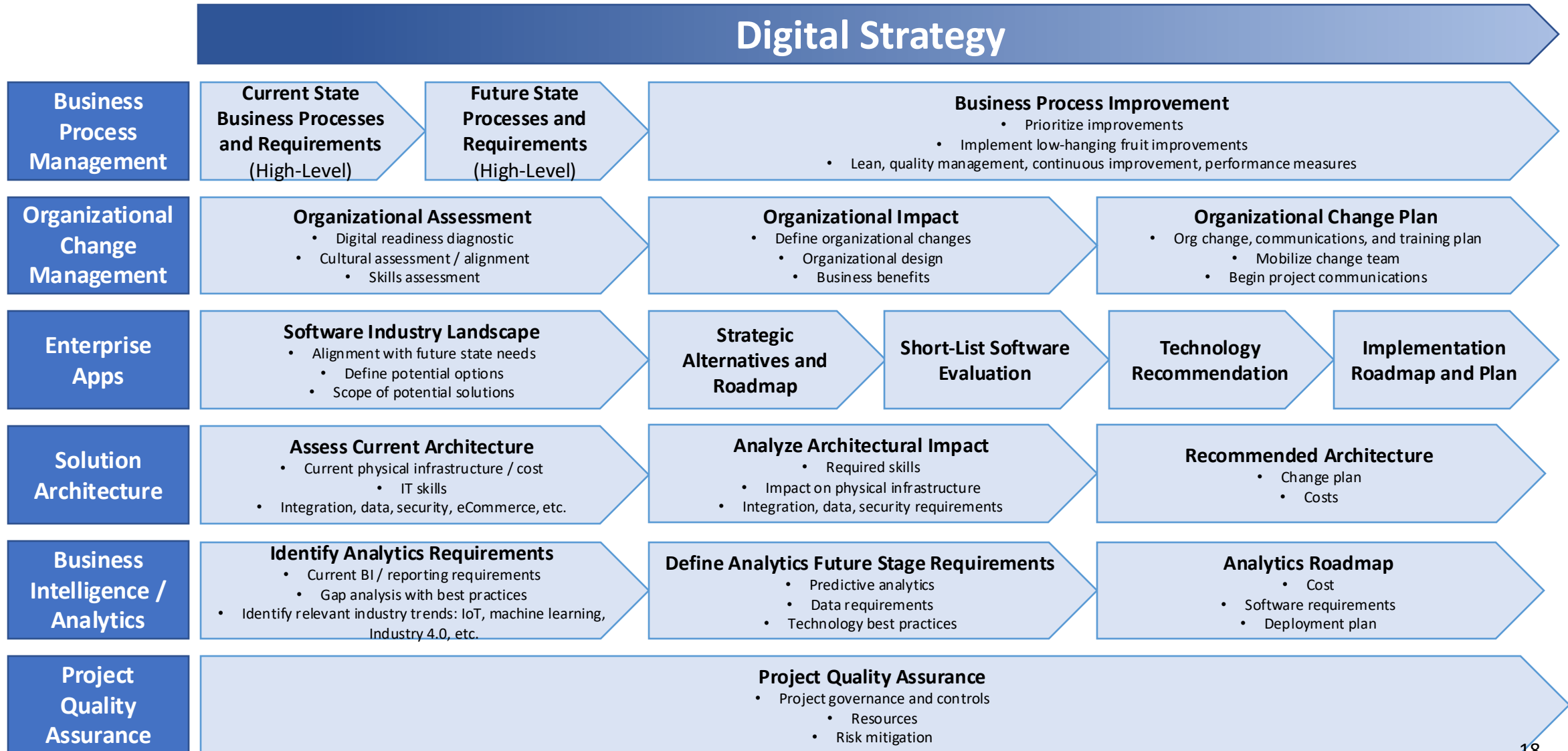


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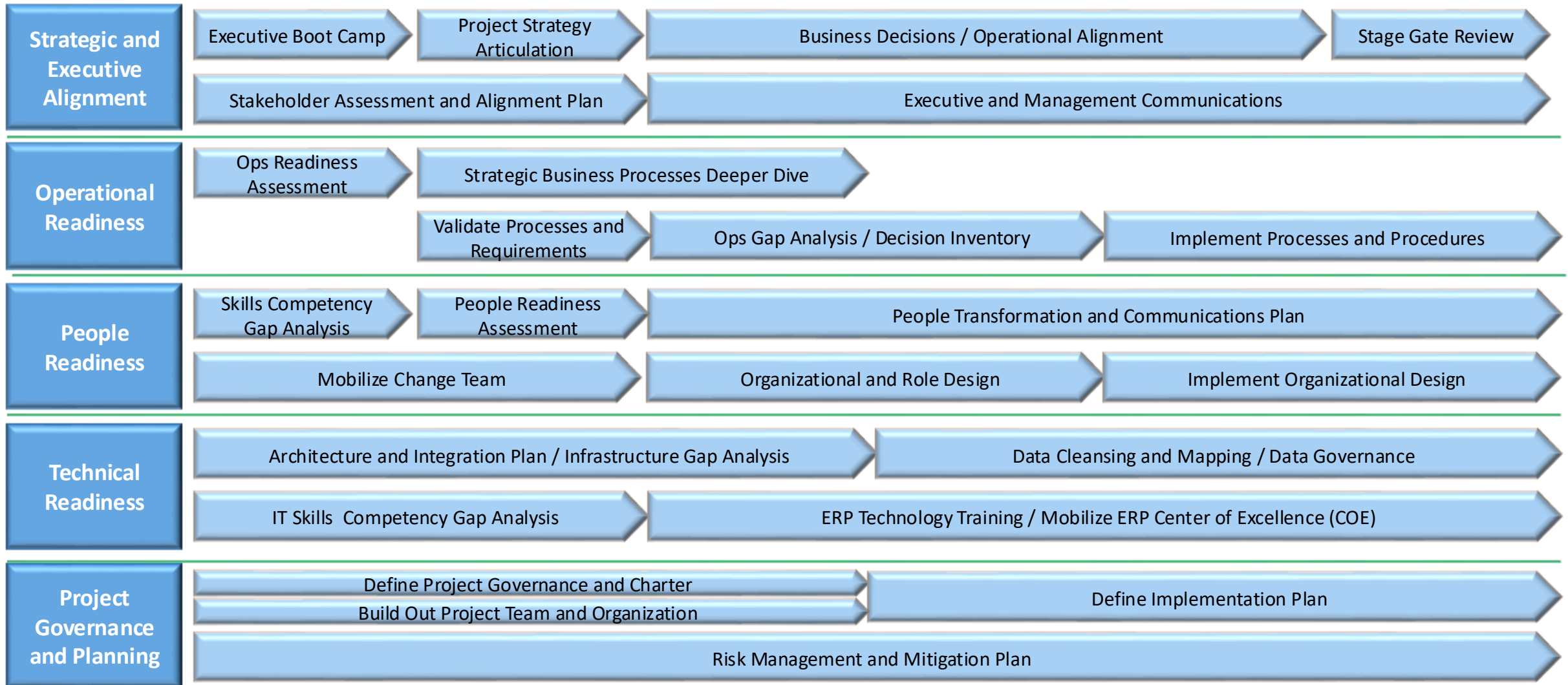
Questions

Plan for Digital Transformation

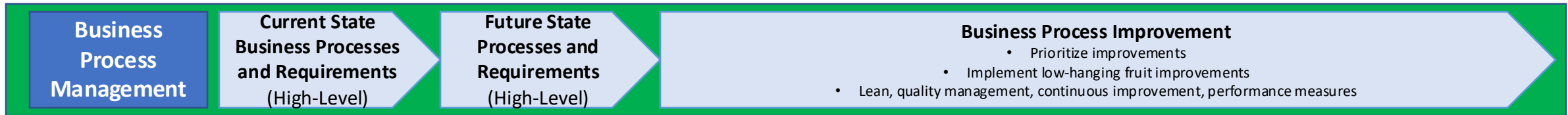




Implementation Readiness Plan



Business Process Management



- Identify business objectives
- Define value drivers
- Define core competencies
- Assess alignment

Define Business Goals



- Identify areas of inefficiency
- Analyze potential areas of improvement
- Provide foundation for new processes

Identify Pain Points




- Address inefficiencies and pain points
- Identify opportunities to better align with business goals
- Improve future state

Map New Processes




- Quantify business improvements
- Include soft and tangible benefits
- Focus on ability to scale with existing team

Quantify Benefits




- How will we measure business benefits?
- Develop benefits realization plan
- Align with BI and analytics requirements

Define KPIs / Metrics



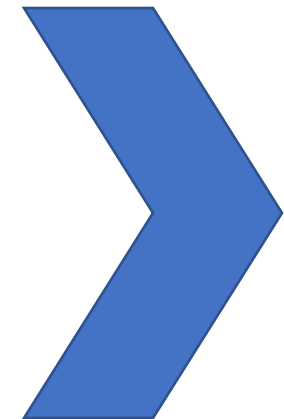
- Process changes will inevitably affect people
- Define specific changes to specific stakeholders and work groups
- Foundation for OCM strategy and plan

Identify Change Impacts



- Defined process changes create risks
- Identify alternatives to mitigate risk
- Develop risk management plan

Define Risks

Input Into:

- Future state requirements
- Digital strategy and roadmap
- Organizational change management plan
- Interim business process improvement plan

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Case Study: ERP-enabled Transformation

Client Profile

Large government agency that provides bus, rail and handicapped transportation services in its region

Engagement Overview

Drive adoption of new ERP and ways of working

Business Context	Challenges	Consulting Solution
<ul style="list-style-type: none"> ▪ Client established a corporate business objective to reduce their extensive manual, redundant processes and transform their organization leveraging technology ▪ Client had an antiquated version of PeopleSoft that was implemented poorly and reinforced organizational silos ▪ Client decided to transform the organization by restructuring the organization and implementing new processes implementing PeopleSoft in phases over multiple years 	<ul style="list-style-type: none"> ▪ Many long-term employees very set in how they did their jobs ▪ “As-is” implementation of PeopleSoft had a very bad reputation internally. ▪ Some people’s jobs were “workarounds”, so they were threatened by increased efficiencies (they were worried about their jobs) ▪ “As-is” organizational structure was highly siloed at both the executive and associate levels ▪ Client team members assigned to this effort had numerous competing priorities 	<ul style="list-style-type: none"> ▪ A cross-functional, cross-company team was established to address: <ul style="list-style-type: none"> ▪ PeopleSoft ▪ OCM and Training ▪ Team developed the OCM plan based on interviewing 65 Client associates and then analyzing the findings against OCM methodology and the PeopleSoft implementation plan ▪ OCM team generated excitement around the program via publicizing early “quick hits” and ongoing success stories ▪ OCM team guided C-suite team members in their personal roles to drive adoption ▪ OCM team defined new job roles and associated skills required

Technology-enabled Finance Transformation (ongoing)



Client Profile

Multi-national publishing company

Engagement Overview

Prepare client team for finance transformation project

Business Context	Challenges	Consulting Solution
<ul style="list-style-type: none"> ▪ Client is a highly successful publishing company with highly antiquated systems and inefficient / inconsistent processes across finance team globally ▪ Client intent to continue to grow (e.g., via acquisition), but recognized difficulties in doing so because of “as-is” finance operations ▪ Client created and filled a new role to lead implementation of new finance system, who quickly determined that what was needed was large scale finance transformation, not just new finance system 	<ul style="list-style-type: none"> ▪ Finance leadership team has worked together for 10+ years, so new hire has no credibility and is trying to drive extensive transformation ▪ No global governance – teams in countries across the world work independently ▪ Extensive use of Excel ▪ Many long-term employees very set in how they did their jobs ▪ Difficult relationship between IT and Business ▪ Rampant “hero culture” has people working exceptionally long hours, so lack of availability for project ▪ Acquired companies, though part of the transformation, want to continue to operate independently 	<ul style="list-style-type: none"> ▪ Conducted extensive global surveys and focus groups to ascertain what finance associates think about finance transformation and identified appropriate actions to take to improve their awareness and opinion ▪ Improved alignment of finance leadership team members via anonymous survey, one-on-one discussions and facilitated face-to-face meetings ▪ Established productive working relationship with IT PM ▪ Conduct coaching sessions with finance executive team members

Case Study: IT Outsourcing

Client Profile

Global pharmaceutical and medical device manufacturer

Engagement Overview

Enable smooth transition as IT services (operations, infrastructure, data center management, technical DBA functions and e-mail) were outsourced to a strategic partner

Situation	Approach	Impact
<p>Global decentralized technology infrastructure services transitioning</p> <p>Short timeframe (~4 months) to complete transition</p> <p>Incomplete due diligence</p> <p>Pressure to skip planning and simply execute</p> <p>Client sponsor not well known throughout the global locations</p>	<p>Quickly developed high-level OCM plan</p> <p>Focused on tangible activities and results</p> <p>Collaborated with client team and vendor PM to ensure plan was reasonable and sufficiently tactical</p>	<p>Developed use cases leveraged to message changes appropriately</p> <p>Successfully implemented and facilitated effective global Change Champion network (members drove communications activities at their local sites)</p> <p>Enabled global leaders to deliver effective messages at the best times</p> <p>Enhanced communications between sites and the corporate project team</p> <p>Ensured comprehensive and successful training</p>

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