Change Management and Feasibility Assessment Report

1. Change Type and Status Analysis

The analysis of change types and their current statuses reveals the nature and progress of projects within the organization:

- **Change Types** include "New System Deployment" and "Policy Change," among others.
- The majority of "New System Deployment" projects are actively being worked on ("In Progress" - 479) or have been successfully completed (222), showing steady momentum.
- A smaller portion of these projects are in the early stages ("Proposed" - 45) or have been deferred (42).
- "Policy Change" projects predominantly show an "Approved" status (145), indicating most policy updates have passed review.

This distribution reflects an active management of change initiatives, with a focus on advancing critical deployments and formalizing necessary policies.

2. Feasibility Assessment Distribution

Projects are classified based on feasibility into three categories: Low, Medium, and High.

- **High Feasibility:** 5,763 projects, indicating strong confidence in execution.
- **Medium Feasibility:** 2,854 projects.
- **Low Feasibility:** 883 projects, representing a minority but critical risk pool.

The predominance of high-feasibility projects shows strategic focus on manageable and realistic initiatives.

3. Departmental Feasibility Breakdown

Assessing feasibility by department uncovers risk distribution within business units:

- The **Clinical** department leads with the highest number of projects (3,863) and the greatest count of low-feasibility projects (352), highlighting it as a focus of complexity and caution.
- **IT** and **Quality Assurance** have substantial project loads with moderate low feasibility.

- Departments such as **Executive, HR, Finance, and Operations** show lower counts of low-feasibility projects, reflecting more stable or lower-risk change environments.

4. Top Risk Factors and High-Cost Projects

Risk factors and project costs are critical to prioritizing oversight:

- Most frequent risks are **Training Requirements** (2,856 occurrences) and **Integration Challenges** (1,929 occurrences), followed by data migration and regulatory issues.
- The top 10 highest-cost projects largely belong to **Quality Assurance** and **Clinical** departments, with project costs near $2 million each.

This points to resource-intensive efforts concentrated in high-impact, high-risk departments.

5. Readiness Level and Current Project Status Overview

Readiness levels and project activities indicate operational progress:

- Majority of projects are **fully ready** (4,782) or **partially ready** (2,307).
- Only 458 projects are marked as **not ready**, indicating generally strong preparation.
- **In Progress** (4,753) projects surpass **Completed** (2,488), showing an active project pipeline.
- Project stages "Proposed" (458) and "Deferred" (438) remain comparatively low, suggesting efficient advancement of initiatives.
- A moderate segment (1,363) of projects holds "Approved" status, reflecting projects poised for execution.

6. Financial Analysis: Costs by Feasibility and Owner

Examining financial commitments offers insight into investment patterns:

- **High Feasibility** projects command the highest average estimated cost (~$312,120) and total investment (~$17.98 million).
- **Medium Feasibility** projects have moderate average costs (~$303,192) and total costs (~$8.65 million).
- **Low Feasibility** projects, despite slightly lower average costs (~$299,217), accumulate considerably less total spending (~$2.64 million).

- Key owners such as **Paul Morgan** manage projects totaling over $3.8 million, with several others managing comparable portfolios, underscoring diverse responsibility for project costs.

7. Risk Levels and Potential Benefits

Understanding the risk spectrum and expected benefits helps balance opportunities:

- **High (4,738)** and **Critical (2,366)** risk projects dominate, demanding effective risk management.
- Key potential benefits include **Cost Savings**, **Risk Reduction**, **Enhanced Compliance**, and **Improved Efficiency**.
- Several change types, including technology upgrades and process changes, target strategic improvements such as risk reduction and revenue increase.

8. Impact Score Analysis

Quantifying project impact highlights priority initiatives:

- The average impact score across projects is approximately **5.42** on a 1-10 scale.
- Five top "In Progress" changes scored a perfect 10, located mainly in **Clinical**, **IT**, and **Quality Assurance**, signaling their critical influence on organizational goals.

9. Upcoming and Overdue Implementations

Tracking project timelines emphasizes operational discipline:

- Several projects from **IT**, **Clinical**, **Operations**, and **Quality Assurance** are scheduled for implementation within the next 90 days.
- Multiple changes, primarily in **Clinical**, **HR**, and **IT**, are overdue, with target implementation dates in early 2024, yet remain incomplete.

These findings suggest imminent deadlines for new initiatives and highlight areas needing corrective action to address delays.

10. Readiness and Change Ownership

Additional insights on readiness and project management workload:

- Average readiness is highest for **completed** projects and lowest for **deferred** ones, confirming preparation correlates with execution success.

- Project ownership is distributed among several key managers, with **Paul Morgan** and **Noah Hughes** managing over 1,200 changes each.

11. High-Risk, Low-Feasibility Projects and Approval Ratios

Monitoring risky and less feasible projects:

- Numerous projects classified as both **high/critical risk** and **low feasibility** are approved or underway; their management demands heightened attention.
- The approval-to-deferment ratio stands at approximately **3.11 to 1**, reflecting an organizational preference for progressing initiatives.

12. Barriers to Ready and Deferred Changes

The most frequent risk factors impeding project readiness include:

- **Training Requirements** (232 deferred projects)
- **Data Migration Issues** (194)
- **Integration Challenges** (187)
- Followed by regulatory compliance and system downtime.

Addressing these barriers proactively could reduce deferments and increase project throughput.

Summary and Recommendations

- The organization exhibits **dynamic change management**, emphasizing **high-feasibility, high-impact projects** primarily in **Clinical, IT, and Quality Assurance**.
- There is a **strong emphasis on readiness and risk assessment**, with most projects either fully or partially ready and many in active progress.
- Financial resources are largely allocated to projects projected to succeed, managed by multiple key owners balancing the portfolio.
- Key challenges remain around **training, data migration, and integration**, often causing deferrals and readiness delays.
- Overdue projects and high-risk, low-feasibility initiatives warrant enhanced monitoring and risk mitigation strategies.

- The healthy approval-to-deferment ratio suggests proactive decision-making but warrants vigilance in managing complex projects.
- Upcoming implementations demand focused execution to meet deadlines, while lessons from deferred projects should guide process improvements.