OCM THE EASY WAY, OR ADKAR IS JUST OKR'S, NOT EXECUTION

AN OPINIONATED APPROACH BY JAMES K SMITH
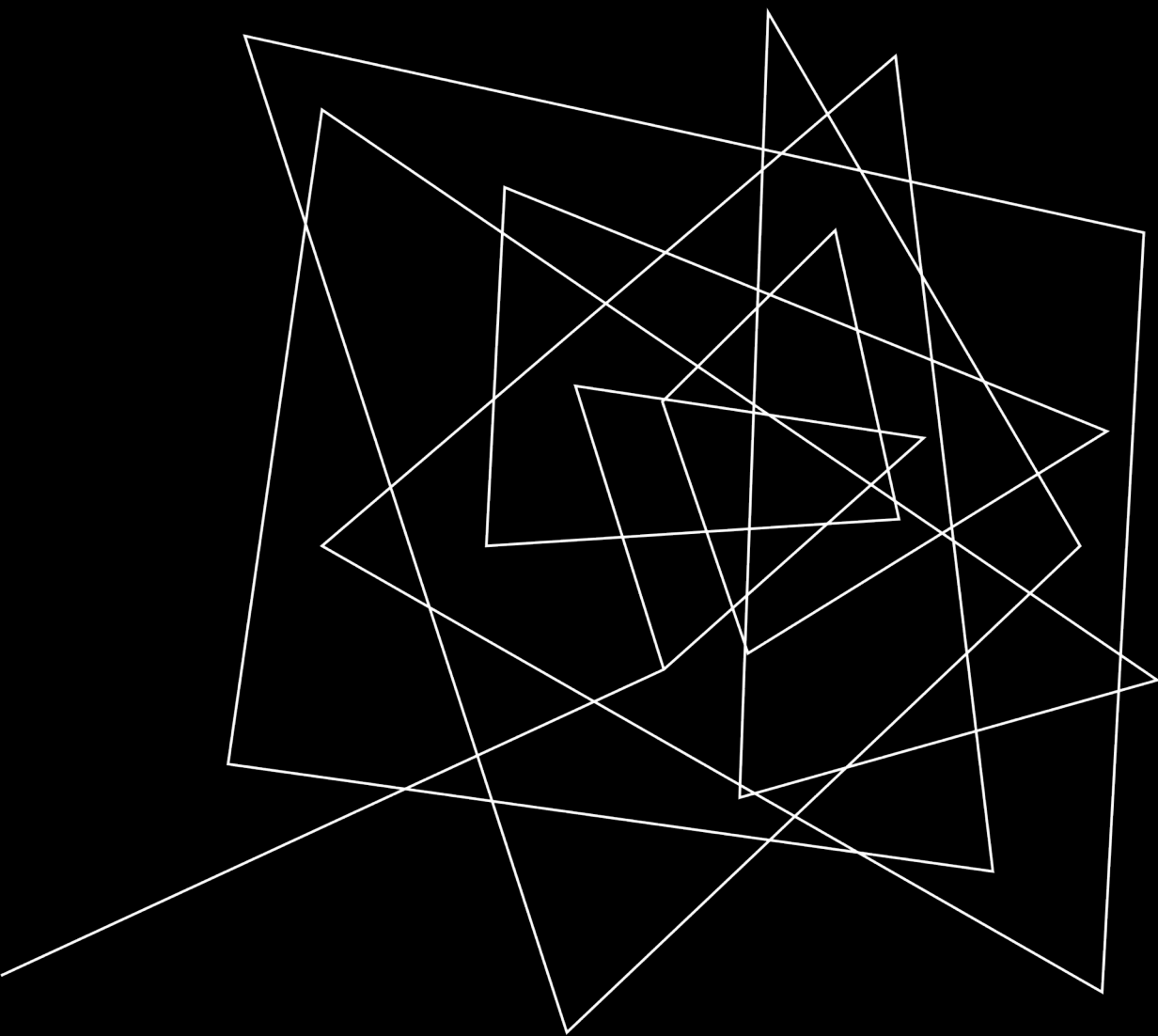
INTRODUCTION

ADKAR is a change management methodology offered by Prosci.

ADKAR is normally implemented as a series of prescribed steps by management with facilitation of those steps by OCM consultants.

What the author is proposing is that with a phased, systemic approach to OCM, ADKAR should be treated as a set of OKRs, and not an action plan.

What follows is a description of this phased approach.

WHAT IS ADKAR?

ADKAR is an acronym representing a sequence of steps used to implement to organizational change management:

• **Awareness:** Understanding why the change is necessary and the risks of not changing

• **Desire:** Personal motivation and willingness to support and participate in the change

• **Knowledge:** Information, training, and education on how to change

• **Ability:** Demonstrated capability to implement the change and achieve the expected performance levels

• **Reinforcement:** Factors that sustain the change, including recognition, rewards, and measuring adoption

See notes slide for additional comments.

FACILITATION SCOPE OF ORGANIZATION (PHASE 1)

Steering Group:

- Sets mandate for organizational change.
- Identifies objectives and key results (OKRs).
    - Use ADKAR for objectives.
    - Identify assessed behaviors and outcomes as evidence that those objectives have been met.
- Approves/schedules/prioritizes training for project/product delivery teams.
- Acts as top level in the issue/escalation chain and risk management system.
- Identifies a "reference" value stream as test driven harness delivering new operational MVP

Coaching team (full line of sight to Steering Group):

- Provides training material to steering group for approval.
- Delivers training classes to delivery teams.
- Designs/operates training/coaching kanban board for delivery teams.
- Proposes/designs value streams to feed delivery teams.
- Proposes the "value stream team," comprised of roles and sub-teams (including the delivery teams currently under training).

FACILITATION SCOPE OF ORGANIZATION (PHASE 2)

Coaching Team:

- Provides training material for value stream teams upstream from delivery teams for approval.
- Delivers training classes to upstream teams.
- Designs/operates training/coaching kanban board for upstream teams.
- Operationalizes reference value stream.
- Delivers quarterly value stream assessment. Presents findings to steering group.

Steering Group:

- Analyzes assessment findings. Compares to proposed OKRs.
- Platform adjustment kaizens (improvements) proposed.
- Kaizens facilitated by both steering group and coaching team.

FACILITATION SCOPE OF ORGANIZATION (PHASE 3)

Steering Group:

- Approves portfolio separation into two separate groups, a) Investment and b) Operational
- Identifies objectives and key results (OKRs) for investment level.
- Approves/schedules/prioritizes training for investment teams.

Coaching Team:

- Provides lean portfolio management training material to steering group for approval. Heavy emphasis on techniques for tracking cycle and lead times to forecast project completion and budgets.
- Delivers training classes to investment teams.
- Designs/operates training/coaching kanban board for investment teams.
- Development of key dashboard tracking and forecasting project completion times and costs.

FACILITATION SCOPE OF ORGANIZATION (PHASE 4)

Emphasis on both sustainability and continuous improvement.

Steering Group:

- Executes iteration schedule for a long-lived version of Phase 2.
- Works with coaching team to determine sustainabilty OKRs.
  - These OKR's will inform steering group regarding leaning out or deprecation of coaching team.

- New Initiative:
  - AI discovery:
    - Constraints/cost of different AI engines (competitive analysis).
    - Contractual compliance with vendor.
    - Organizational governance.

  - AI integration:
    - Tools for investment and operational portfolio levels.
    - Efficacy study.
    - Rollout and communications plan.

NOTES

1) ADKAR encapsulates desired behaviors and best practices.

2) Push the planning of work as close as possible to the teams actually doing the work.

3) High performing teams scale higher quality solutions, while individuals do not.

4) Don't make high performing teams wait for individuals to make decisions; That's a classic system waste.

5) Autonomy and high performance go hand-in-hand.

6) Treat ADKAR as key results while teams and coaches work together to discover their own ways to become high performing.

7) Coaches should have substantial exposure to practices and habits of high performing teams, since they can pay that experience forward to make discovery more efficient.

8) Once teams achieve this level, treat them as a source of "healthy backpressure" on upstream teams. Acting as the "canary in the coal mine" they serve a critical role in risk management and continuous improvement.

9) OCM is not an "event." It is continuous for the high performing, learning organization.

10) Increasing profit is a function of taking risks. High performing teams are great at risk analysis.

HOW TO "GAMIFY" ORGANIZATIONAL VALUE DELIVERY

- Game objective: Use less energy to create more revenue. The game is played as long as the organization exists.

- Value streams are like game boards. They frame the flow of the game.

- The teams are the players. They help each other deliver value.

- The game mechanics are the rules to play the game.

- The primary game mechanics are the Definition of Ready, the Definition of Done, and Working Agreements.

- Each team can have their own set of game mechanics.

- Game play involves flow of value and teams collaborating to maintain flow of value via the game mechanics.

- Behaviors and best practices become codified into the rules.

- Teams focus on individuals, managers focus on game mechanics, stakeholders focus on objectives.

- "Don't hate the player, hate the game." Finger pointing not allowed. If something is wrong, focus on changing the rules.

- Love the game, love the players.