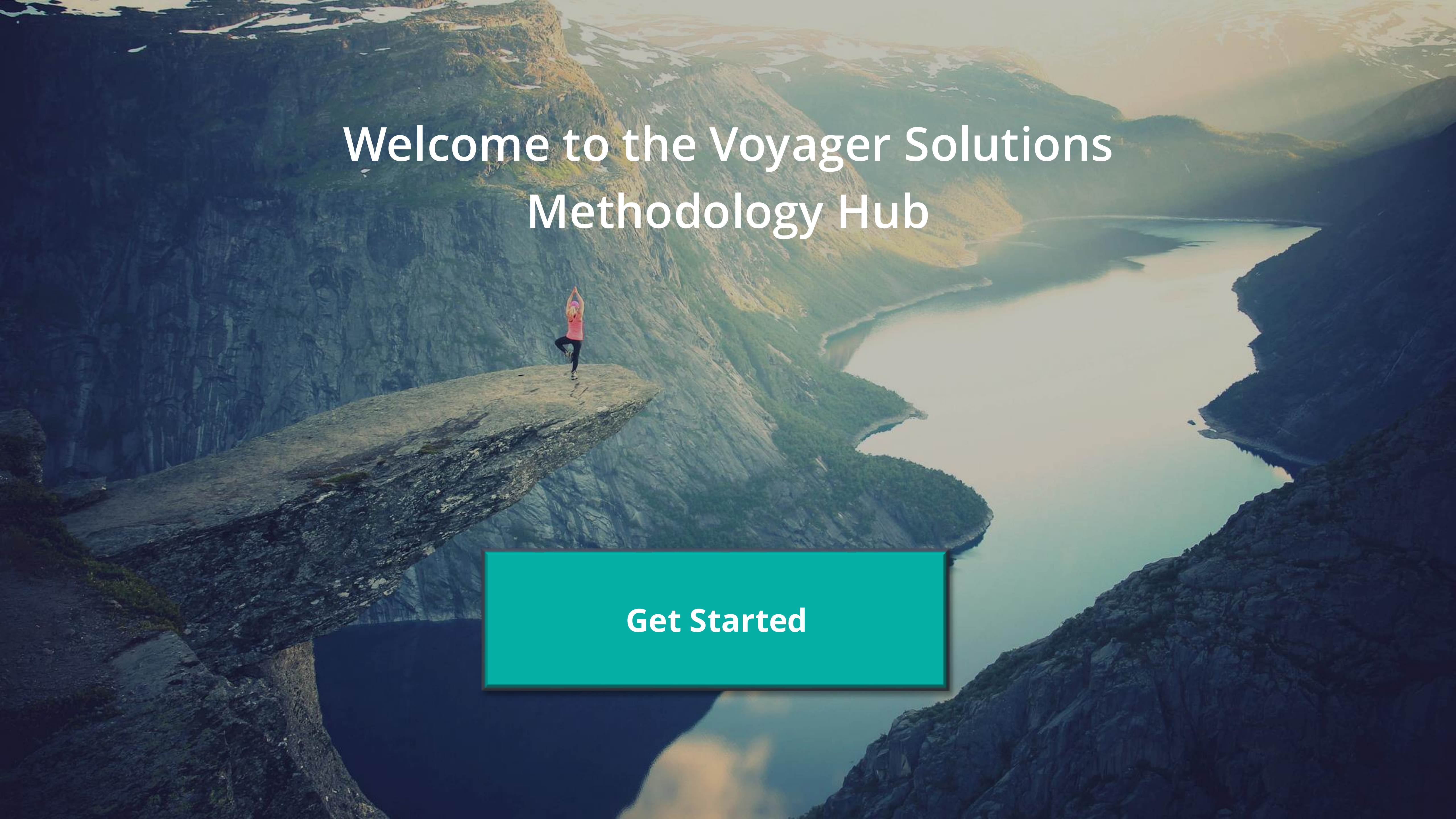
OneStream Partnership

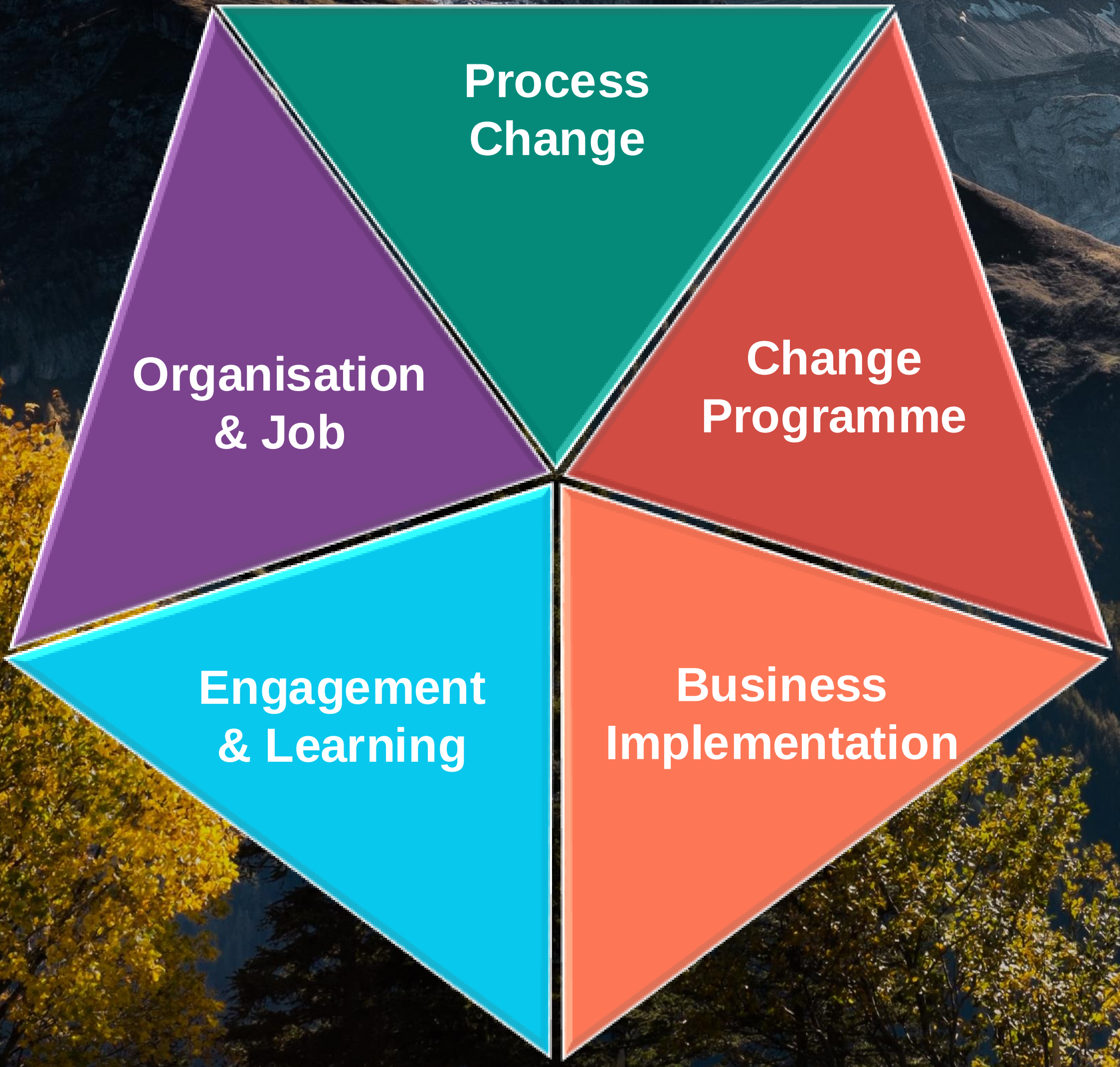
VOYAGER
SOLUTIONS

Welcome to the Voyager Solutions Methodology Hub



Get Started

The Five Accelerator Areas



PROCESS CHANGE
PRO 1 Set the Standards fir the process work
PRO 2 Create great formats to get people involved
PRO 3 Implement the process changes

CHANGE PROGRAMME MANAGEMENT
CHG 1 Identify impacted processes & people
CHG 2 Identify change risks & opportunities
CHG 3 Publish a great change plan

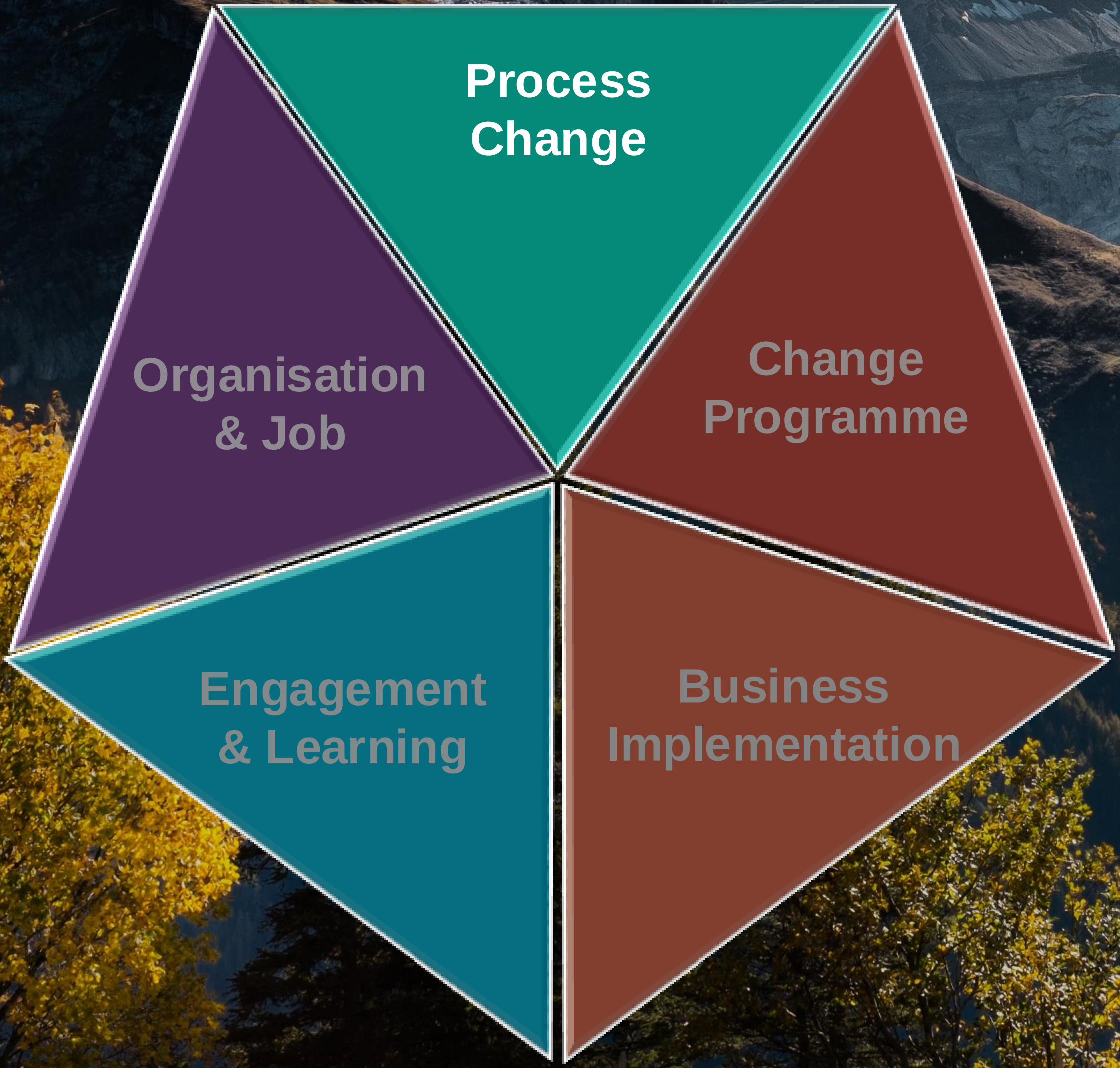
BUSINESS IMPLEMENTATION
IMP 1 Establish governance
IMP 2 Conduct implementation workshops
IMP 3 Develop business readiness checklists
IMP 4 Monitor business actions

ENGAGEMENT & LEARNING
ENG 1 Assess audience needs
ENG 2 Define strategy and approach
ENG 3 Define catalogue, standards and environment
ENG 4 Prepare logistics and develop
ENG 5 Deliver, evaluate and improve

ORGANISATIONAL ALIGNMENT & JOB IMPACT AND ALIGNMENT
ORG 1 Establish governance for decisions
ORG 2 Redesign organisation and roles
ORG 3 Develop profiles layer by layer
ORG 4 Monitor HR actions for impacted areas
ORG 5 Launch and monitor handover

JOB 1 Identify major HR and ORG impacts
JOB 2 Conduct a job impact analysis
JOB 3 Plan and monitor business & HR actions
JOB 4 Engage leaders to deliver actions for key roles
JOB 5 Make the changes and educate key roles

The Five Accelerator Areas



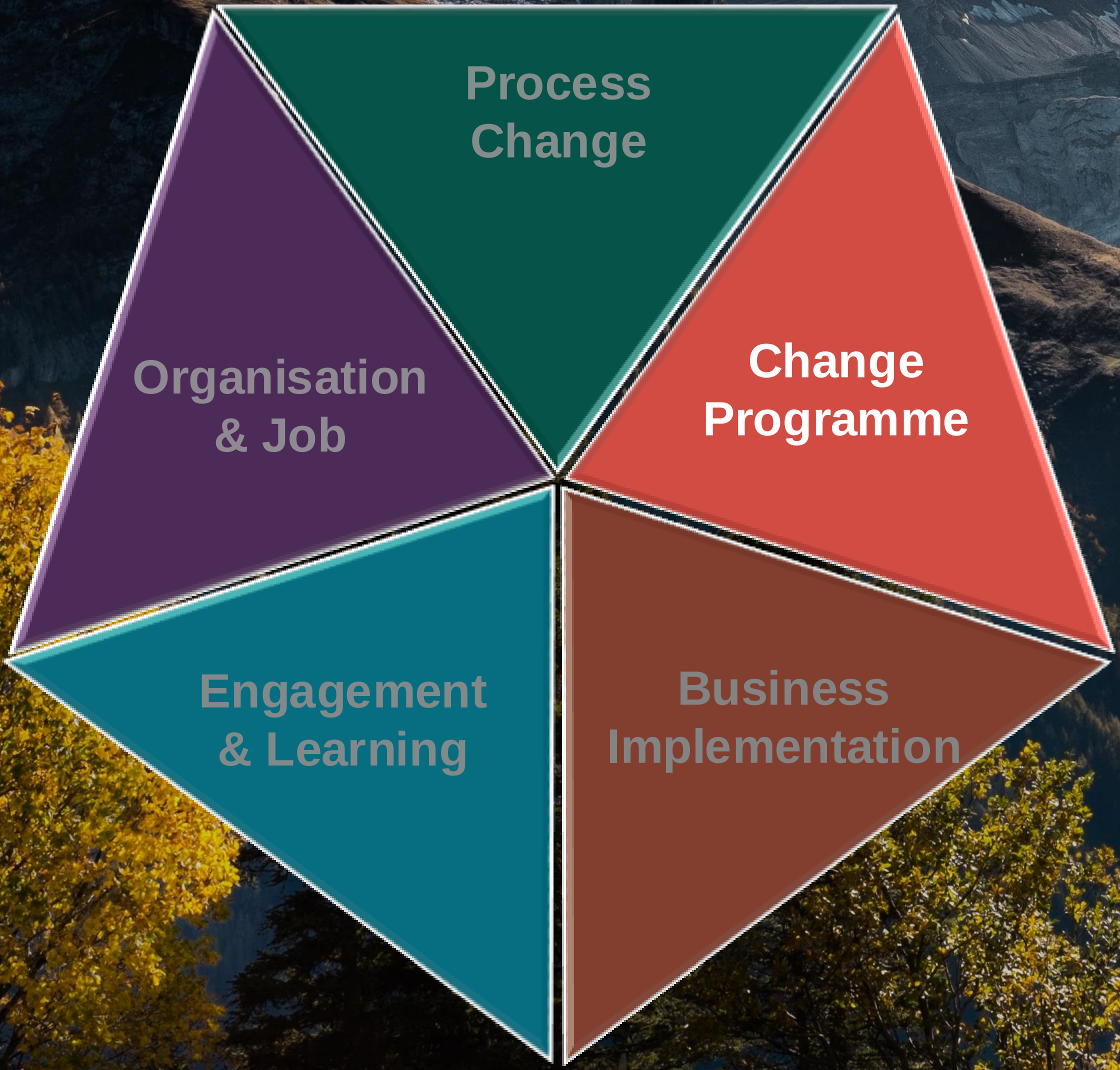
The Process Change Journey

Creating process material is often a key aspect of a Change programme. This methodology involves setting clear standards for the formats required, producing great formats (like matrices or swim lane diagrams), then implementing the process changes.

Also features Flight decks – a format for making existing processes more visible.

Learn More

The Five Accelerator Areas



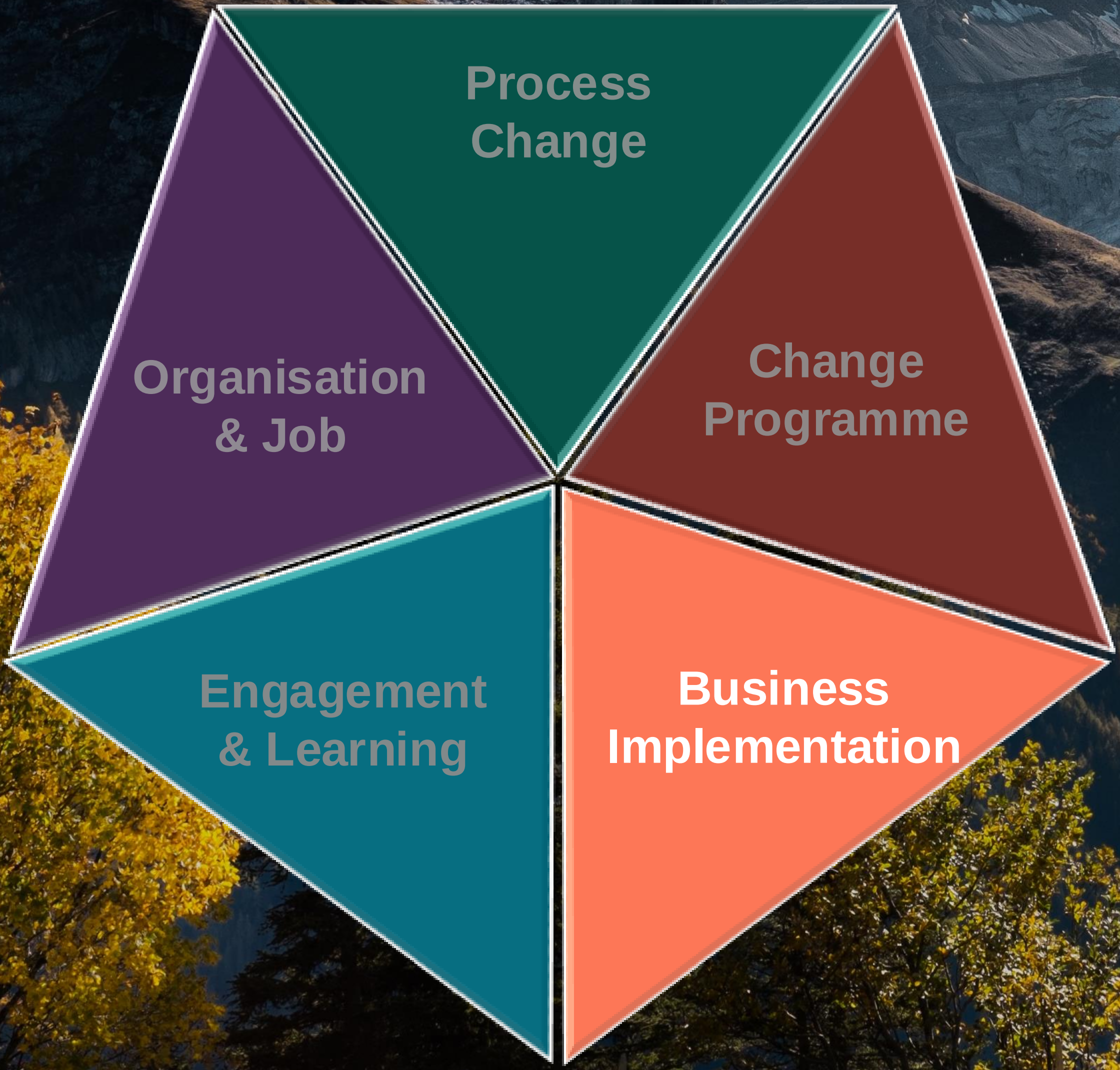
The Change Programme Journey

As a Change Management Practice, all our projects start with a Change Programme. The journey ensures that we understand the scope of the impacts that a project is generating, the audiences affected by these impacts, and that we produce a robust plan for dealing with these impacts in the remainder of the project.

Ideally, we would have a 3–6-week discovery phase at the beginning of a project solely focused on completing the Change Programme Journey, but this isn't always the case.

Learn More

The Five Accelerator Areas



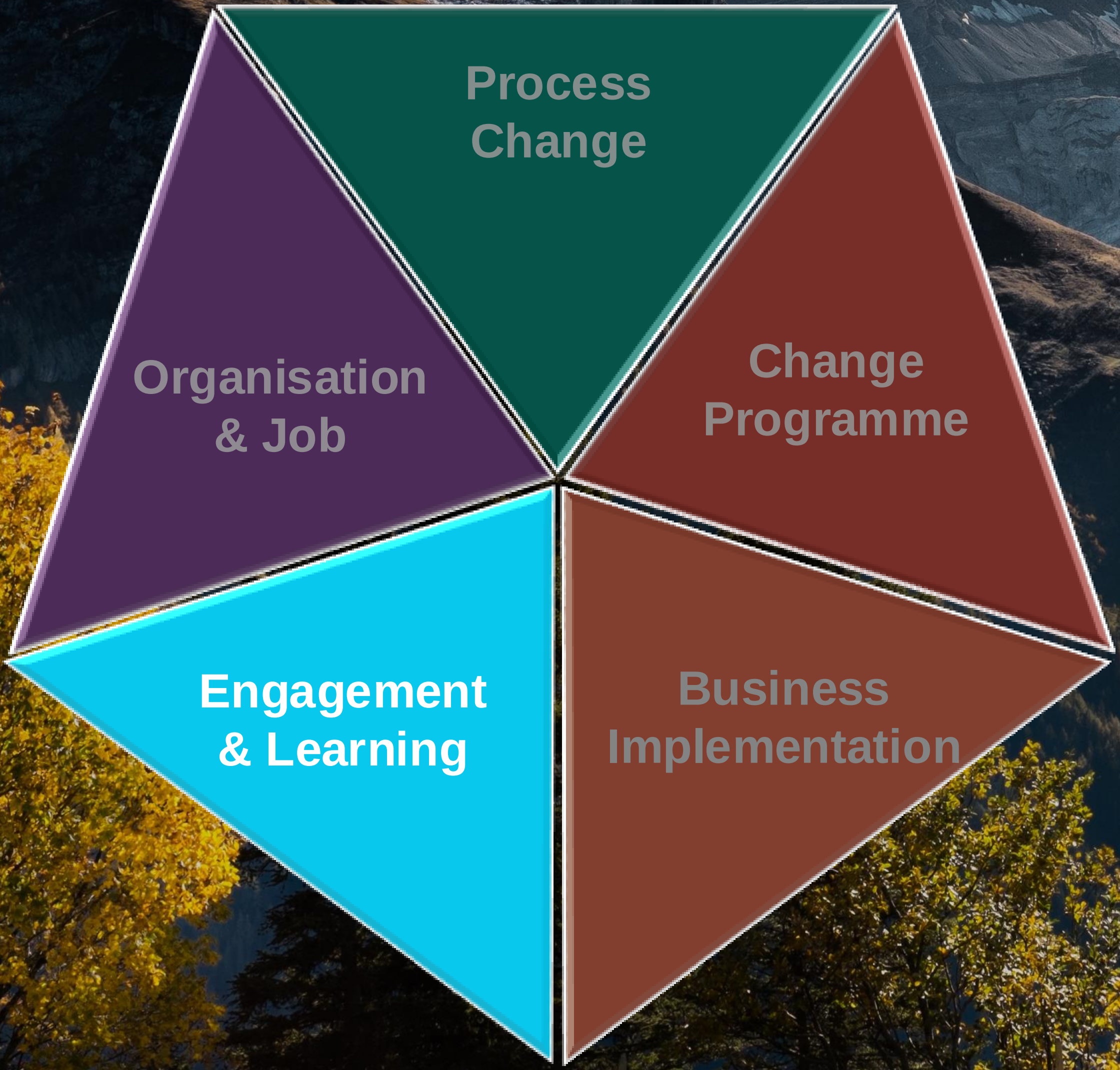
The Business Implementation Change Journey

Often the purview of a Project Manager or PMO role, the Business Implementation Journey ensures that all key project actions required for a Go-Live are achieved.

These are often associated with a system implementation but could also be the implementation of a new Org structure, new policies, or various other project types. This journey details how to create an effective project plan; how to conduct workshops and how to build and maintain a Business Readiness Checklist.

Learn More

The Five Accelerator Areas



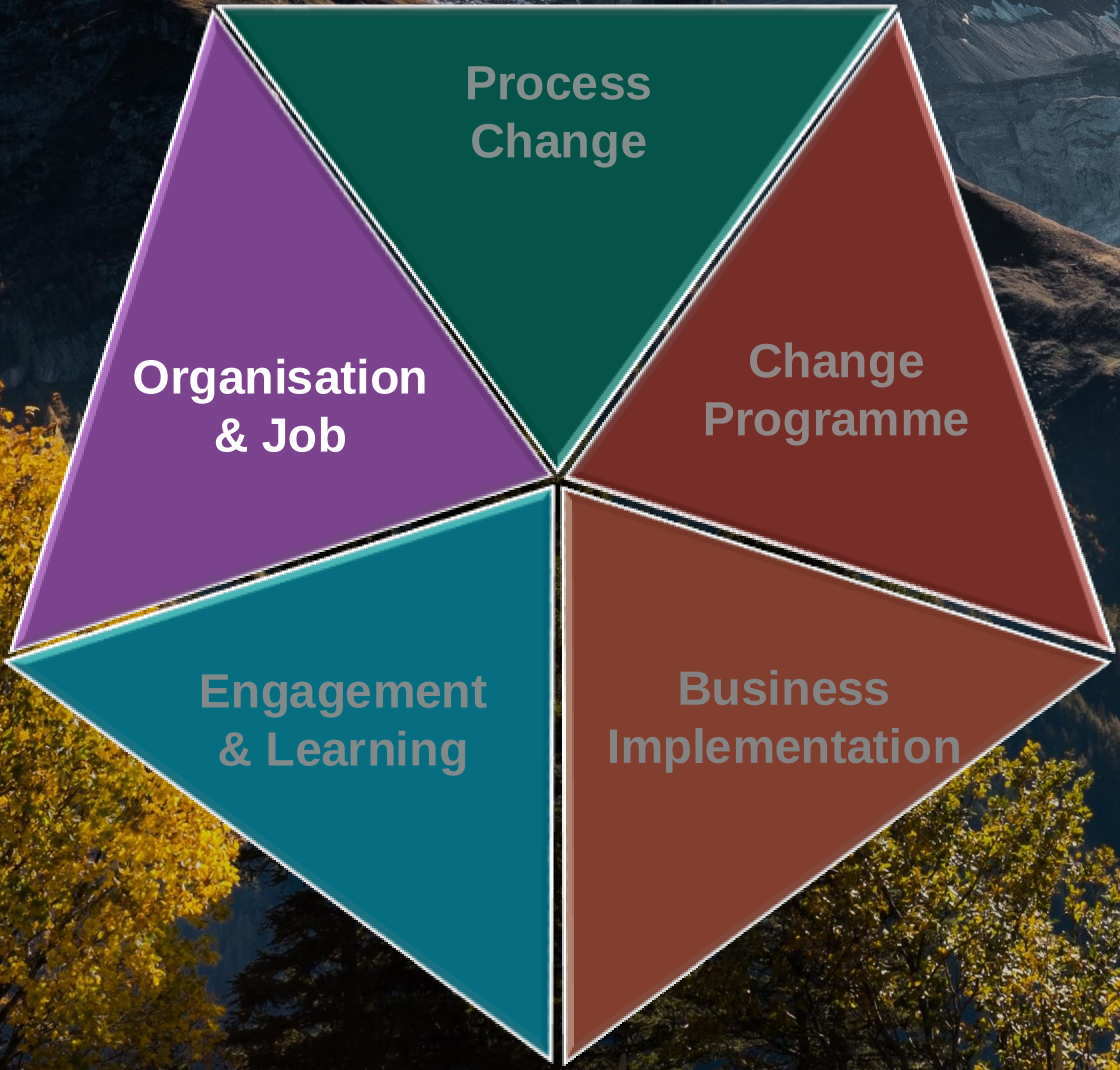
Introduction to the Engagement & Learning Change Journey

An Engagement and Learning Journey involves identifying audiences who will be impacted by a Change Programme, and the channels available to reach them. A plan is then created to map out the messages they should receive in the lead up to Go-Live, and a sequence or timeline for when these should be delivered.

Finally, Comms or Training materials are produced and delivered to the audiences according to the plan, with close monitoring for feedback and providing further support as required.

Learn More

The Five Accelerator Areas



Organisation Impact
A methodology for making organisational decisions – first engaging decision makers and outlining options, then making the decisions layer by layer, then monitoring any actions required to successfully implement the change

Job & Process Impact
A methodology for identifying major HR/Process impacts on an organisation, then assessing the impact at Job level and monitoring any actions required to successfully implement changes,. Also includes engaging leaders and educating key roles in the changes.

Organisation & Job

Job & Process

Level 2 Slides

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Process Change

Set the standards for the process change

Create Great Formats

Implement the process changes

Set the Standards for the process work

Create great formats to get people involved

Implement the process changes

Case Studies

Change Programme

Identify People and Process

Identify impacted processes & people

Log Risks and Opportunities

Identify change risks & opportunities

Publish Change Plan

Publish a great change plan

Case Studies

Business Implementation

Establish Governance → **Workshops** → **Business Readiness Checklists** → **Monitor Business Actions**

Establish Governance

Conduct implementation workshops

Develop business readiness checklists

Monitor Business Actions

Case Studies

Engagement and Learning

Assessment

Assess the audience needs and channels available.

Strategy

Publish strategy document with approach and key RACI

Plan

Source technologies and publish development plan and training catalogue

Development

Publish development plan and build / source the learning materials

Delivery

Educate on responsibility changes

Deliver process and policy education

Deliver system training

Support

Evaluate and monitor

Case Studies

Organisation and Job

Establish governance

Establish governance for decisions

People to Organisation Mappings

Redesign organisation and roles

Organisation Options and Impacts

Develop profiles layer by layer

HR Actions Tracker

Monitor HR actions for impacted areas

Knowledge Transfer Tracker

Launch and monitor handover

Case Studies

Job and Process Impacts

Identify Major Impacts	Job Impact Analysis	Plan and monitor actions	Engage leaders to drive actions	Manage changes and educate
Identify major HR and Org impacts	Conduct a job impact analysis	Plan and monitor business & HR actions	Engage leaders to deliver actions for key roles	Make the changes and educate key roles

Case Studies

Level 3 Slides Temples

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SOLUTIONS

Process Change

PRO 1

Set the standards for the process change

Set the standards for the process work

- Create a charter document that outlines which process formats are needed by which people, and which formats will suit their needs.

Accelerator – Programme Process Charter

- The Charter provides a one page view of which processes need to be mapped/presented and which formats shall be used.


"Being the Best"

Finance Transformation
Project Charter Document
16th February 2007

Link to Template

Top Tips:

- Find out what standards and tools the client uses for process documentation
- Try to use the project documentation standards as a default

Process Change

PRO 2

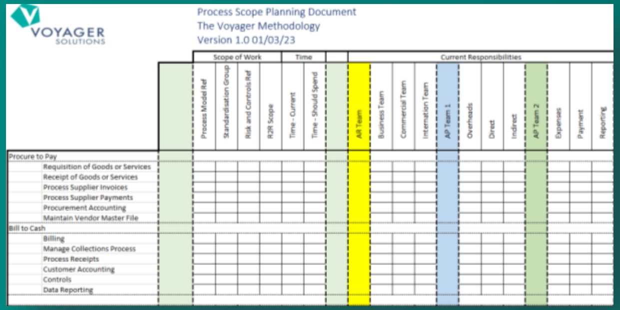
Create Great Formats

Create great formats to get people involved

- Set up and facilitate a meeting with all project people that need processes to agree what standards will be used across the piece. For end user materials, involve people from the businesses to select relevant and usable designs.

Accelerator – Process Scope Planning Document

- This matrix can be used to identify which process formats should be developed for which audiences.



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Process Scope Planning Document
The Voyager Methodology
Version 1.0 01/03/23

		Scope of Work				Time			Current Responsibilities											
		Process Model Ref	Standardisation Group	Risk and Controls Ref	R2R Scope	Time - Current	Time - Should Spend		AR Team	Business Team	Commercial Team	Internation Team	AP Team 1	Overheads	Direct	Indirect	AP Team 2	Expenses	Payment	Reporting
Procure to Pay																				
Requisition of Goods or Services																				
Receipt of Goods or Services																				
Process Supplier Invoices																				
Process Supplier Payments																				
Procurement Accounting																				
Maintain Vendor Master File																				
Bill to Cash																				
Billing																				
Manage Collections Process																				
Process Receipts																				
Customer Accounting																				
Controls																				
Data Reporting																				

Link to Template

Top Tips:

- Try to re-use process material where you can – test scripts make a good source of material for transactional training

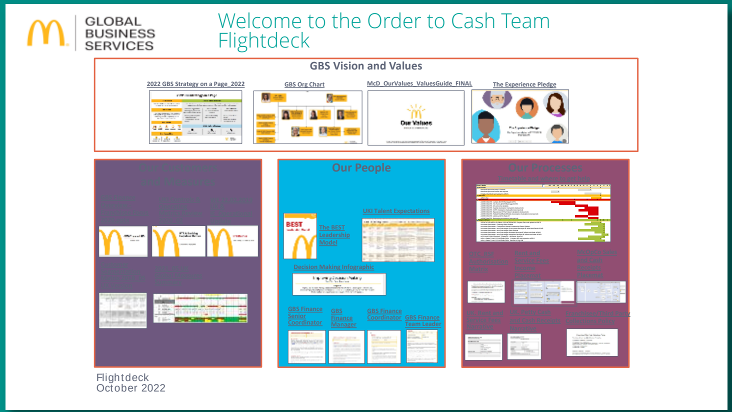
Process Change

PRO 3

Implement the process changes

Implement the Process Change

- Construct a four panel flightdeck consisting of the following sections: Team Members – to show any relaunched structures; Customers – to focus on satisfaction levels; Measures – to focus on team PKIs; and Operational Improvements.



Accelerator – The Flightdeck

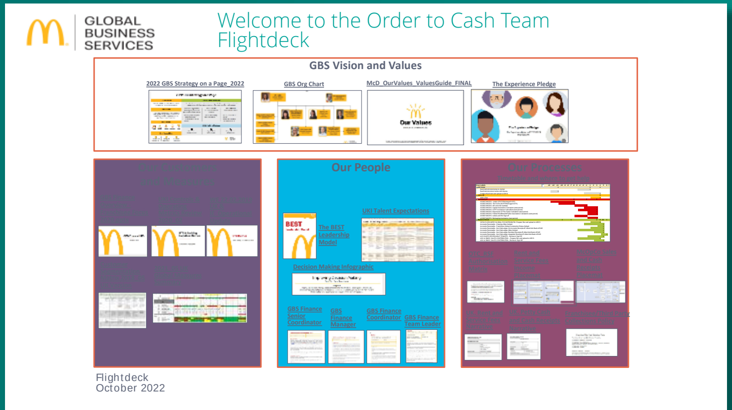
- The Flightdeck provides ‘at a glance’ visibility of over project team structure and implementation progress, including highlighting any issues and their respective corrective actions.

Link to Template

Top Tips:

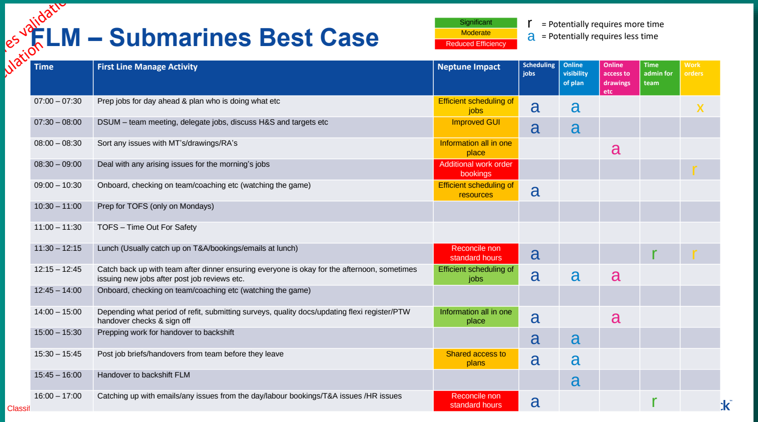
- Flight-decks if used properly can bring in a culture change in an area by forcing us to consolidate our approaches – finding the source materials for them may not be easy – the flight deck facilitates the journey but putting them together can take time

Process Change – Case Studies



McDonalds Flight Deck

Day In The Life 1 Formats (Babcock)



Time	First Line Manage Activity	Neptune Impact	Scheduling jobs	Online visibility of plan	Online access to drawings etc	Time admin for team	Work orders
07:00 – 07:30	Prep jobs for day ahead & plan who is doing what etc	Efficient scheduling of jobs	a	a			x
07:30 – 08:00	DSUM – team meeting, delegate jobs, discuss H&S and targets etc	Improved GUI	a	a			
08:00 – 08:30	Sort any issues with MT's/drawings/RA's	Information all in one place			a		
08:30 – 09:00	Deal with any arising issues for the morning's jobs	Additional work order bookings					r
09:00 – 10:30	Onboard, checking on team/coaching etc (watching the game)	Efficient scheduling of resources	a				
10:30 – 11:00	Prep for TOFS (only on Mondays)						
11:00 – 11:30	TOFS – Time Out For Safety						
11:30 – 12:15	Lunch (Usually catch up on T&A/bookings/emails at lunch)	Reconcile non standard hours	a			r	r
12:15 – 12:45	Catch back up with team after dinner ensuring everyone is okay for the afternoon, sometimes issuing new jobs after post job reviews etc.	Efficient scheduling of jobs	a	a	a		
12:45 – 14:00	Onboard, checking on team/coaching etc (watching the game)						
14:00 – 15:00	Depending what period of refit, submitting surveys, quality docs/updating flexi register/PTW handover checks & sign off	Information all in one place	a		a		
15:00 – 15:30	Prepping work for handover to backshift		a	a			
15:30 – 15:45	Post job briefs/handovers from team before they leave	Shared access to plans	a	a			
15:45 – 16:00	Handover to backshift FLM			a			
16:00 – 17:00	Catching up with emails/any issues from the day/labour bookings/T&A issues /HR issues	Reconcile non standard hours	a			r	

Day In The Life 2 Formats (Babcock)

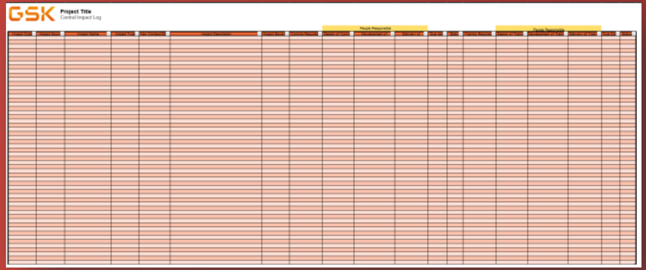
Change Programme

CHG 1

Identify people and process

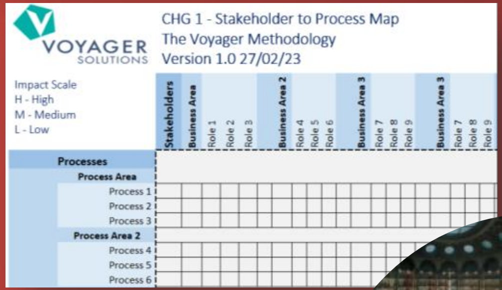
Identify impacts and their audiences.

- Ensure you have all impacts logged and tracked effectively and match them to the audiences that they affect.
- Hold workshops and meetings with those who understand the 'As-Is' & the 'To-Be' to identify all impacts.



Accelerator – Central Impact Log

- With every impact identified, ensure you can gather all the necessary information to complete its row in the Impact Log. Use this to drive all mitigating actions.



Accelerator – Impact to Audience Matrix

- Map all impacts to the audiences who are affected.

Top Tips:

- Keep the impact matrix high level at first – some of the process detail may need to wait for the design to take place

Central Im
Log

Impact t
Audience Mat

Change Programme

CHG 2

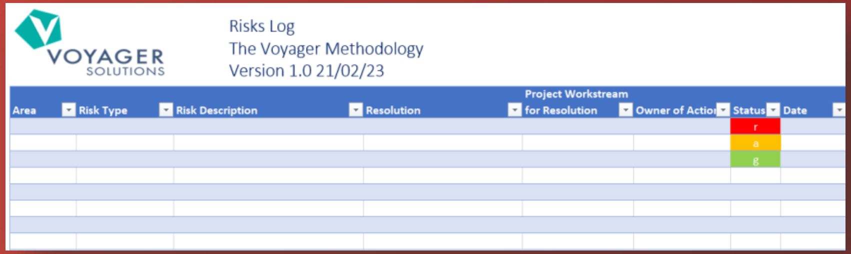
Log risks and opportunities

Identify Change Risks and Opportunities

- To support decisions around mitigating actions for impacts (i.e. Comms, Training, Process decisions, Org decisions etc) having a log of risks and opportunities can be helpful.

Accelerator – Risks & Opportunities Log

- Build a comprehensive log of risks and opportunities that arise throughout the project. Note, part of this information will be included in your Central Impact Log, but having a separate log to track ongoing impacts that are awaiting decisions can be powerful.



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Risks Log
The Voyager Methodology
Version 1.0 21/02/23

Area	Risk Type	Risk Description	Resolution	Project Workstream for Resolution	Owner of Action	Status	Date
						r	
						a	
						g	

Top Tips:

- A lot of items on the opportunities and risk log may be transactional items that simply need stop, start, continue materials – log them and move on – don't let the small items influence the overall strategy

Link to Temp

Change Programme

CHG 3

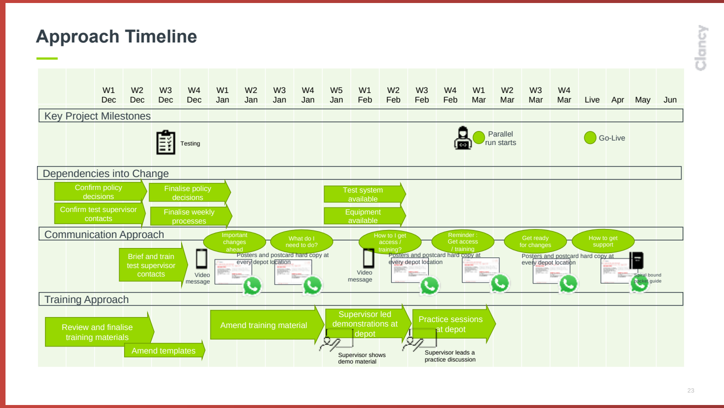
Publish a change plan

Publish a Change Plan

- Create a discussion document which outlines: the key change risks and opportunities; the objectives and key outcomes of work; the guiding principles that will drive the work; and the broad change activities.

Accelerator – Change Management Plan

- The change plan should be the one-stop shop where project sponsors, project team members, impacted business sponsors, HR and solution providers can get a single, consistent view of what is covered by change management.

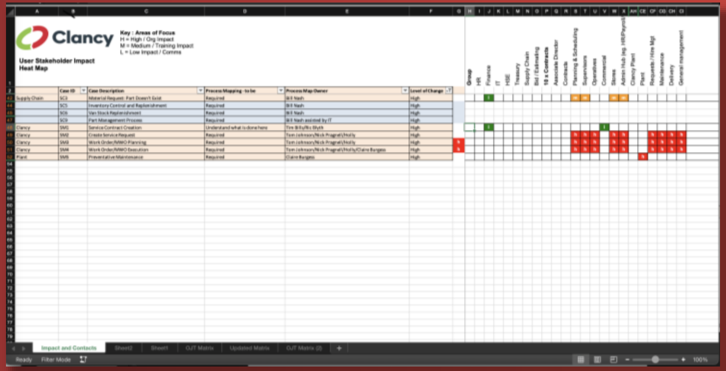


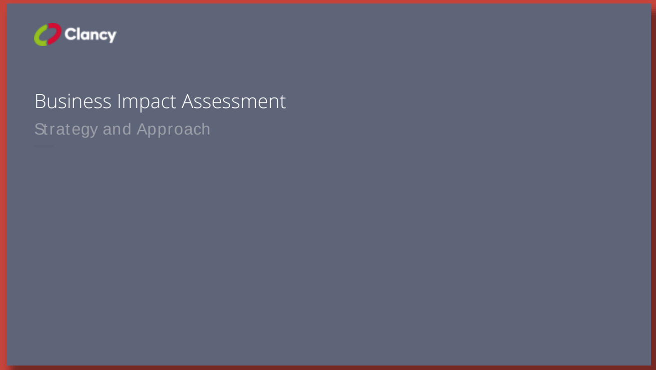
Link to Template

Top Tips:

- Use a change plan format that suits your client – if they like detail, word formats, excel gantt charts for example. It needs to at least outline responsibly and a plan on a page.

Change Programme – Case Studies





Clancy CHG 1

Clancy CHG 2

Rolls Royce CHG 3

[GLD CHG 2 - CLAN2105 Deliverable Summary Impacts_v2.pptx]

Case Study Example: Media Insights Company

Change Management Workstream Rescue

Our client, a leading media and insights company, was 2 months from Go-Live on a OneStream implementation project. They had completed most of the Discovery phase but, due to failing to establish robust ways of working, many key elements from the following stages were missing.

We were able to quickly create robust governance for the Change Management workstream (regular stand-up calls, central impact log to act as single source of truth).

Although we would normally suggest this work is done in a separate Process workstream, we drove many activities to identify and capture process & role changes.

We identified SuperUsers and set up a regular communication channel with them.

We liaised with an external OneStream certified training provider to ensure all our identified impacts were aligned with items on their training schedule.

The client was in-flight with several key elements missing

Grey arrow boxes show missing elements

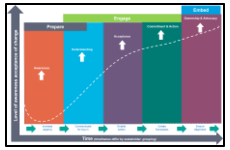
	Discovery	Development	Testing	Implementation	Post Go Live
Change	Establish vision Communicate to senior leaders	Identify process changes	Test system and data ready for testing	Liaise with training provider (if applicable)	Hypercare
	Establish 'As-Is' organisational structure	Identify impacted 'As-Is' audiences	Identify and communicate with testers	Communicate approaching go live to target audiences	Produce FAQ materials
	Capture 'As-Is' pain points	Map 'To Be' organisation roles/activities	Create training materials for testers	Implement facilities/hardware	
	Identify and engage with Super Users	Identify facilities / hardware needs	Establish 'helpdesk' and defect tracking	Support training sessions	
	Identify potential comms formats	Develop bespoke comms & training strategy	Develop training/comms materials for implementation		
	Establish ways of working	Communicate to senior managers/managers	Communicate to FLMs/Staff of upcoming change		

Discovery Complete

Output – Impact Log

September
Established robust ways of working, including central impact log. Identified SuperUsers. Created Project SharePoint site for all users to access all Project related materials.

Development



The Change Curve – the foundation of our Comms Strategy

October
Identified Process Changes and their impacts.
Mapped impacts to audiences.
Supported creation of RACI and other 'To-Be' role documentation.
Developed Comms & Training Plan.

Testing

Output - Superuser Engagement Log

October/November
Chose our SuperUsers as testers, set up their access and ensured they attended earlier tester only training sessions. Developed materials for implementation comms in form of project Newsletters.

Implementation

Output - Training Attendance Statistics

October/November
Enrolled all impacted audiences onto appropriate training sessions, tracked attendance. Rolled out comms materials for changes to process, org impacts etc.

Post Go Live

Output - Hypercare Process Flow

November
Launched Hypercare programme. Produced Comprehensive FAQ document.

Business Implementation

IMP 1

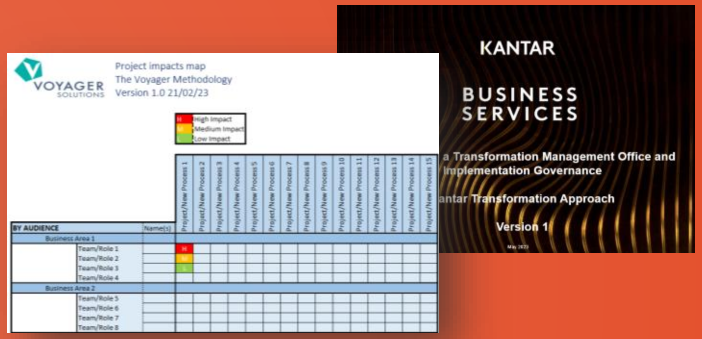
Establish Governance

Establish Governance

- Get hold of a project plan and set up meetings with the project team members to determine which parts of the business they impact, and what type of activities they will need to local business contacts to do for them to prepare for the go-live.

Accelerator – Projects Impacts Map

- This map will show how a project will impact the businesses. The high/medium/low scale easily shows where the highest impacts are.



Project Impacts Map

E2E Business Readiness

Top Tips:
- Don't confuse Business Implementation with Project Management – they run in parallel with the Business Implementation process being owned by the businesses to mirror the plan but outline what THEY need to do

Business Implementation

IMP 2

Workshops

Conduct implementation workshops

- Facilitate workshops between the project team and representatives from the impacted businesses.
- Ask the project members to present each activity and to explain what they require the impacted businesses to do locally to prepare for the changes.
- Throughout the workshop, encourage the impacted businesses to articulate what they will need to do to meet these requirements and note these down.

Here is an example of a workshop to roll-out the implementation approach to business participants.

Accelerator – Poster formats to brainstorm readiness criteria

- Poster formats work well for engaging the businesses to define local actions required. These should broadly be organised into process, people and technology

Link to Templ

Top Tips:
- It is good practice to engage business areas in a session for them to define and take ownership of their own activities but timing does not always allow this – sometimes you have to jump to a go-live checklist

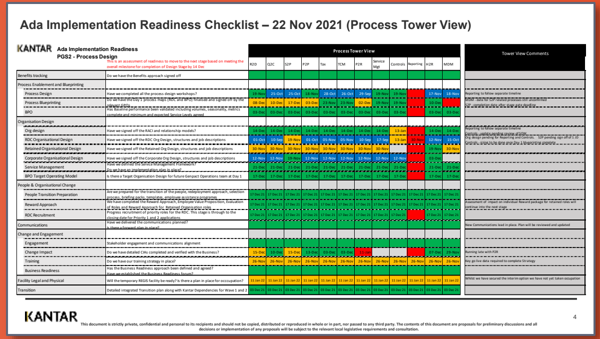
Business Implementation

IMP 3

Business Readiness Checklists

Develop the business readiness checklist

- From the business actions, work out what checklist of actions/criteria need to be complete for each business area in order for them to feel comfortable for go-live.


Ada Implementation Readiness Checklist – 22 Nov 2021 (Process Tower View)

KANTAR

Accelerator – Business Readiness Checklist

The checklist should contain yes/no criteria. Items with a green status are at an acceptable level for go-live, amber items are late but have a plan in place, and red items are those which are currently preventing the go-live.

Link to Template

Top Tips:

- Start with a templated business readiness checklist with EVERY type of business action included and eliminate what is not relevant – don't build from scratch

Business Implementation

IMP 4

Monitor Business Actions

Monitor Business Actions

- The build up to a gate review is repeated for every stage gate in the programme. The final stage gate review is the formal "go / no-go" stage that is important to ensure that an informed decision has been made by all parties to proceed to live.

Top Tips:

- Gate reviews are a quality check to see how ready we are for Go-Live – they do not contain every single thing we are asking businesses to do – they need their own detailed plans as well

Prepare for the stage gate

Confirm the owners for the template criteria

Confirm the criteria with the owners

Arrange the initial session to review and approve the criteria with all owners and Programme Governance

Schedule and run readiness reviews

Arrange sessions weekly for 4 weeks prior to milestone completion date

Carry out line by line reviews of criteria and the status with comments recorded in the appropriate column

File any approvals or evidence of completed criteria in relevant SharePoint folder and add link to the relevant row on the checklist

Final Stage Gate Review

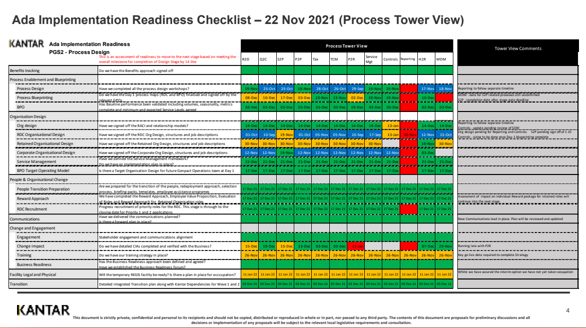
RECORD THE MEETING

Review all criteria (even those marked as previously completed)

Request positive confirmation of approval to proceed from Programme Governance and criteria owners

Follow up meeting with written confirmation and minutes and link to the recording

Business Implementation - Case Studies



Kantar IMP 1

Kantar IMP 2

Kantar IMP 3

Business Implementation – Further Case Studies

1 and 2 demonstrate the veritility of the IMP methodology in supporting detailed HR and outsource projects

IMP HR Detailed comms planning for Redu...	7 hours ago	Paul Taplin
IMP HR How an outsourcing process works....	7 hours ago	Paul Taplin
IMP Methodology for Fit Gap Impact and A...	7 hours ago	Paul Taplin
IMP Roll-out of new program...	7 hours ago	Paul Taplin

1. Vertiv

3. Syngenta

2. Voyager

4. Specsavers

Case Study : Business Readiness Forum

- As we move into transition, the Business Readiness Forum provides the foundation for moving design activities into delivery, by creating a clear set of visible business actions which are owned, driven and aligned to the overall programme plan

1. Plan on a page routemap by business area

- A single, business facing plan on a page
- Creates a single summary of the project milestones that are relevant to each business area
- Shows the interdependencies between initiatives
- Provides a basis to discuss resource expectations across a longer timeframe

2. Business Readiness dashboard / criteria

- Provides a cascaded snapshot of the local activities that are required to support the project
- Includes the heatmap change management activities that were identified
- Provides a wider view of activities covering people; process; data and technology actions
- Is directly linked to the TMO project plan, and is generated from it

3. Rolling 2 week horizon plan with topical deep-dives

- Single place to discuss key project topics
- Forum for workstreams to present project tasks; expectations and resource needs
- Deep dives provide background to the key tasks; inputs and outputs and expectations
- A Glidepath format is used to build a single picture of the week by week expectations on a business area

Why enhance Business Readiness now?

- Our key business sponsors and contacts are keen to understand what the components and detail of a “go-live” looks like
- Our project activities are now moving into a delivery phase – the type of engagement will change
- A layer of Quality Assurance will reduce the risk of non-delivery of confirmed benefits
- We need a consistent way of engaging with our business contacts in one place about expectations
- We need a way of aligning project expectations to other programmes, including GBS operating model

How does it fit with existing programme governance and engagement?

- Existing business engagement methods, plans and contacts continue as planned
- Business Readiness enhances and runs parallel to this, but leverages existing contacts

Case Study - Business Readiness Forum

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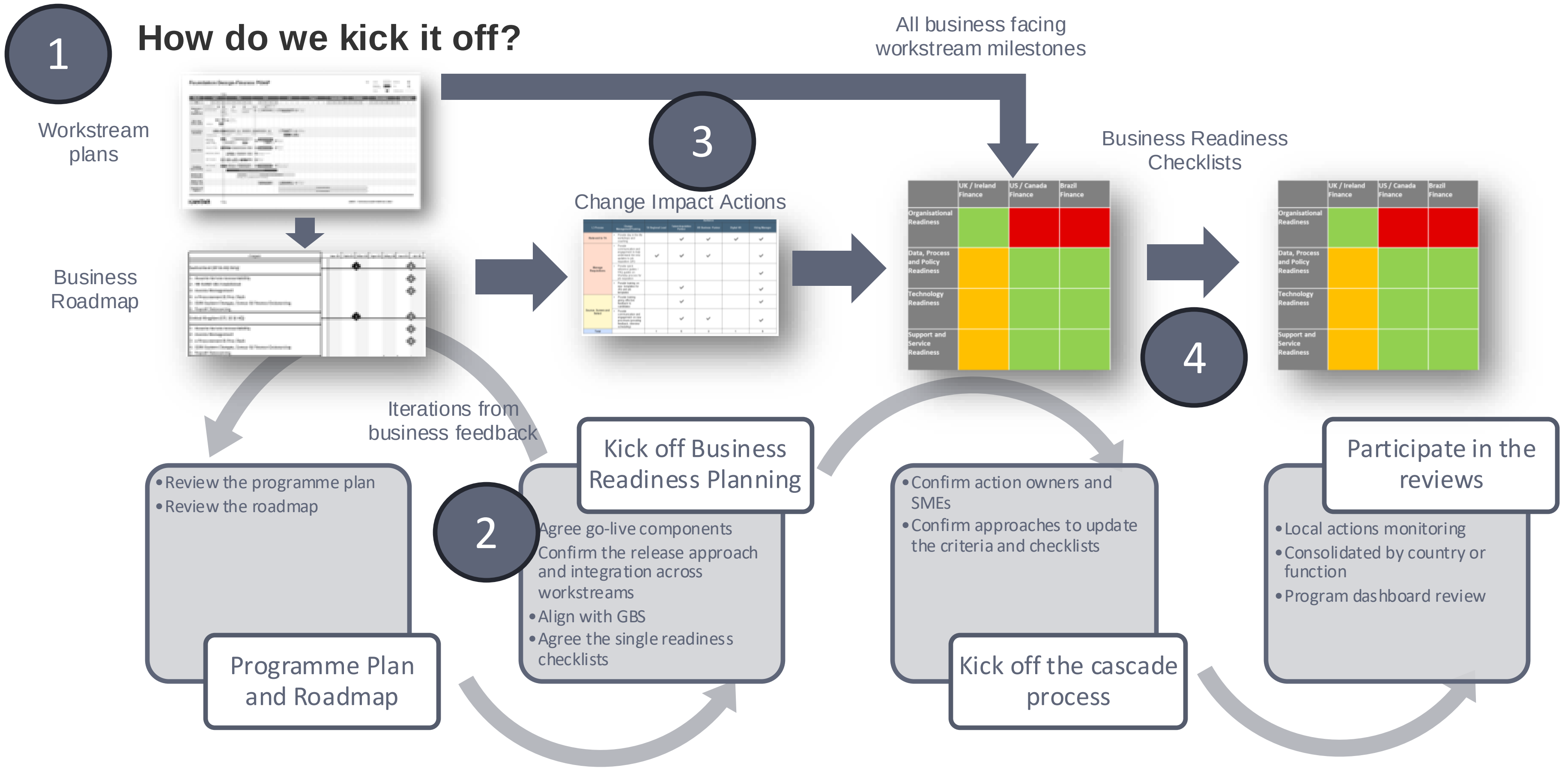

Engagement and Learning

ENG 1

Assessment

Assess the audience needs and channels available.

- Create a breakdown of the impacted stakeholders to understand audiences.

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Audience and Channel Analysis
The Voyager Methodology
Version 1.0 21/02/23

Stakeholder Group	No. of People	Business Area	Complexity	Language	Usage	Frequency	Typical Channels
SALES							
Order Administration	25	Germany, Packaging	Medium	German	80%	Daily	Notice board
Order Administration	30	Germany, Packaging	Medium	German	80%	Daily	Newsletter
Order Administration	40	France, Packaging	Medium	French	80%	Daily	Daily Brief
FINANCE							
Cost Centre Managers	1000	UK	Low	English	0.05%	Monthly	Notice board
AP Accountant	50	UK	Medium	English	90%	Daily	Newsletter
General Ledger Managers	5	UK	High	English	50%	Daily	Daily Brief

Accelerator – Audience and channel analysis

A good audience analysis will contain:

- Logical groupings of audiences;
- Very outcome focussed messages;
- Characteristics that will allow you to select the best methods of delivery.

Link to Template

Top Tips:

- Find people in the organization who have trained before – you can save a lot of time in finding out what generally works well of you engage with L&D!

Engagement and Learning

ENG 2

Strategy

Publish strategy document with approach and key RACI

- Using the audience groupings and a time-line, confirm the messages or engagement activities that will need to be communicated at points along the time-line.

Accelerator – Engagement and learning plan

- The plan should contain the single snapshot of all engagement and learning events planned.

Link to Template

Top Tips:

- Try to understand the standards and methods of learning that already exist in the organization and re-use those if they work!
- If a learning technology is going to be used, start making decisions about how it will be purchased / setup / configured early – these can take time

Engagement and Learning

ENG 3

Plan

Source technologies and publish development plan and training catalogue

- For major events and for learning interventions, create a catalogue which specifies in detail what each specific course will cover. Think about ‘what do I want people to do differently after attending this course’.

Accelerator – Catalogue of brilliant formats

Link to Template

- The catalogue should be the basis of ‘selling’ the events and courses to stakeholders who are recipients, and to people who will need to be involved in creating the content.

Top Tips:

- When using learning technologies, make sure that any setup time is factored in the plans – new technologies can take time to evaluate and install
- Make sure expectations of who will develop and deliver formats are clear – this can be very labour intensive

Engagement and Learning

ENG 4

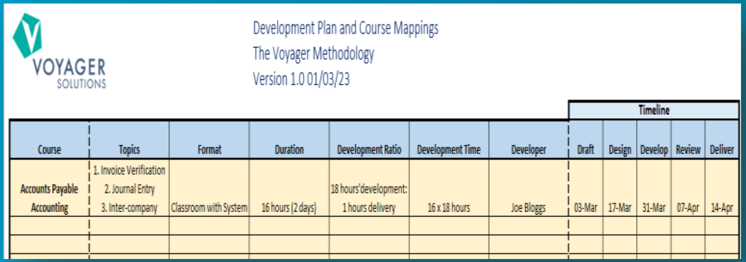
Development

Publish development plan and build / source the learning materials

- Start mapping events to departments, then to teams, then to people as soon as possible to allow for as much notice of event dates.

Accelerator – The development plan and course mappings

- Create a matrix that maps the courses or events to departments, teams and people.
- Use this to estimate how many people will need to be on each event based on room capacity, and cluster people into groupings which can be used to confirm course dates.


VOYAGER SOLUTIONS

Development Plan and Course Mappings
The Voyager Methodology
Version 1.0 01/03/23

Course	Topics	Format	Duration	Development Ratio	Development Time	Developer	Timeline: Draft	Design	Develop	Review	Deliver
Accounts Payable Accounting	1. Invoice Verification 2. Journal Entry 3. Inter-company	Classroom with System	16 hours (2 days)	18 hours'development: 1 hours delivery	16 x 18 hours	Joe Bloggs	03-Mar	17-Mar	31-Mar	07-Apr	14-Apr

Link to Template

Top Tips:

- If you find that you have a small specialist team it may be easier to involve them in a project activity such as testing as an alternative to building a full training design
- Remember that some users will need training before UAT if they are supporting this activity

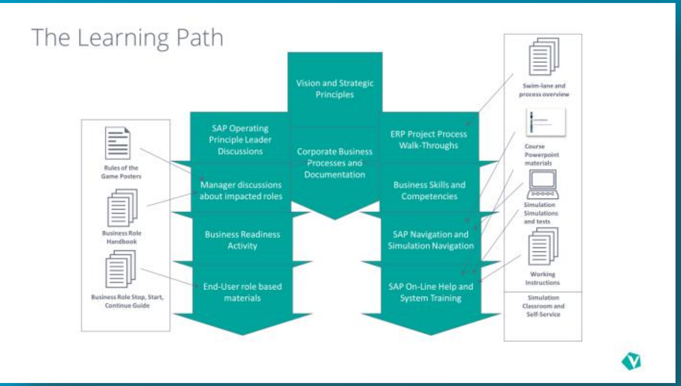
Engagement and Learning

ENG 5

Delivery

Educate on responsibility changes
Deliver process and policy education
Deliver system training

- Deliver the messages or events with passion.
- Evaluate the success by assessing the use of traditional measures such as quality of the room, instructors and materials. Importantly assess whether the individuals are 'job ready' – can they go back to work and perform the key tasks that are expected of them?



Link to Template

Accelerator – Role-Based Materials

- Numerous materials to track actions etc at a role level, e.g.; RACI Chart; Skills and Training Matrix; Training and workshops.

Here is an example of an end t
with a learning path and exa
formats

Top Tips:
- Find out what techniques your client has for evaluating effectiveness of events
- Find out if course attendance and skills attained need to be recorded on an LMS system after each course – this needs advanced planning!

Engagement and Learning

Support

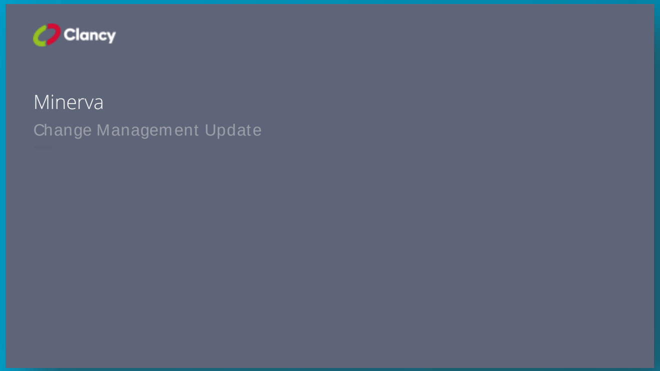
Provide support Post Go-Live with further training/comms if required

- Support any follow up training and comms required by the programme post-go live.
- Create bespoke materials based on feedback from users, if there is a need
- Can take the form of FAQs or ‘How Do I’ comms campaign

On Clancy we published postcards with key support information

Top Tips:
- Some training will also need to be delivered post go-live if it is seasonal or only happens 1/4ly or annually

Engagement and Learning – Communication Examples

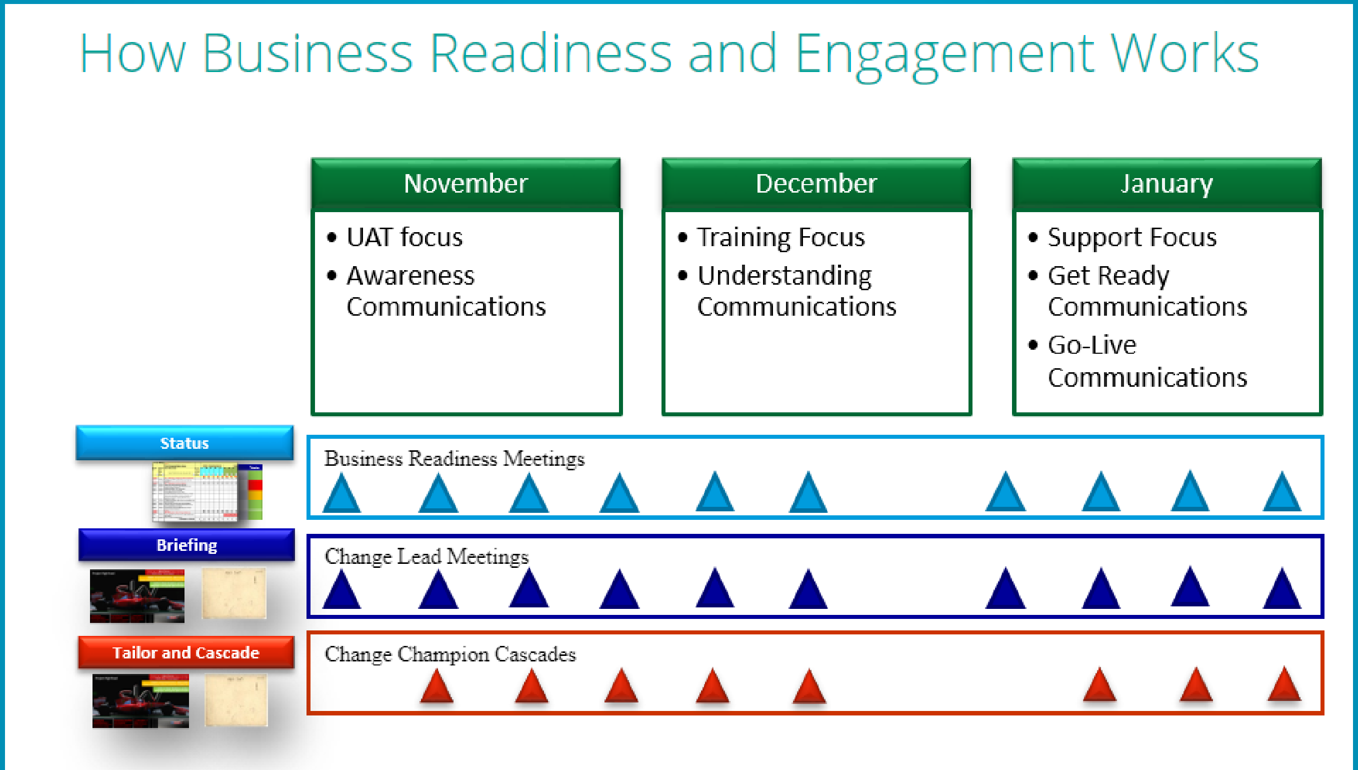


Voyager Academy Toolkit

Clancy Minerva Toolkit

Engagement and Learning – Champion Networks

Champion networks can be a great way of cascading engagement and learning programmes



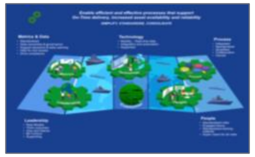
Case Study #1 – Global Defence Contractor

- We supported a Global Defence Contactor at the Discovery and Development stages of a large-scale ERP roll out.
- Initially we interviewed managers and operatives across the organisation to establish a baseline for awareness of the programme, existing ways of working and pain points, and views on draft communication strategies for the programme.
- We then worked with the client to create graphics and video content to communicate the vision for the programme, and developed supporting materials for vision workshops with senior execs and managers
- As the programme moved into 'Development' phase, we captured in depth data from stakeholders across the organisation on 'As-Is' structure and mapped impacts of the programme, highlighting recurring themes and escalating issues

Discovery | **Development**

Output - Discovery Interviews Findings

- Organise and conduct Discovery interviews
- Capture feedback
- Analyse and condense outputs
- Present to project team



Output - Vision Poster

- Develop project logo and vision picture(s)
- Support vision workshop with senior leaders

Output - Org Chart with mapped Change Impacts

- Capture 'As-Is' organisation data
- Capture and map impacts to organisation
- Conduct workshops to develop 'To-Be' organisation

Output – Steering Group Slide Deck

- Support delivery of workshops with Managers on upcoming change

Case Study – Large UK Construction Firm

- We have worked with one of the largest privately owned construction firms in the UK on multiple programmes in the Testing, Implementation and Post Go-Live stages, rolling out changes UK-wide in their HR and Payroll systems
- We supported PMO and Governance on a programme during the 'Testing' stage – facilitating HR Business Partner forums, maintaining Readiness Checklists, Action and Risk logs, and communicating with testers
- We developed & deployed Comms & Training strategies for multiple programmes - which included physical (postcards, posters, training booklets) and virtual (training videos, email) comms to a largely industrial workforce
- We also supported the programmes in the 'Post Go Live' stage, creating follow up comms and training materials (eg. 'How Do I?' posters covering key processes) based on feedback from users

Testing | Implementation | Post Go Live

Output - Business Readiness Checklist

Output – Comms Timeline

Output – Poster Comms

Output - 'Checklist' Guide

- Chair HR business partner meetings
- Set up and maintain Risk Log, Readiness Checklist

- Developed bespoke training and comms strategies for each programme

- Produced physical and virtual materials for impacted audiences, and co-ordinated distribution

- Produced targeted Post Go-Live comms and training, based on feedback from users

Organisation and Job

ORG 1

Establish governance

Establish governance for decisions

- If a project is going to change the structure of an organisation, it will need a process for engaging with the leadership to formalise and make the decisions required

Accelerator – Decisions Log for Organisational Governance

- Tracking of the key organisational decisions required and the status of those decisions is key. A log is often used for this.

Top Tips:

- Decisions about the future structure can easily be undone as well as made so make sure they are formalized and signed off.

Link to Templa

Organisation and Job

ORG 2

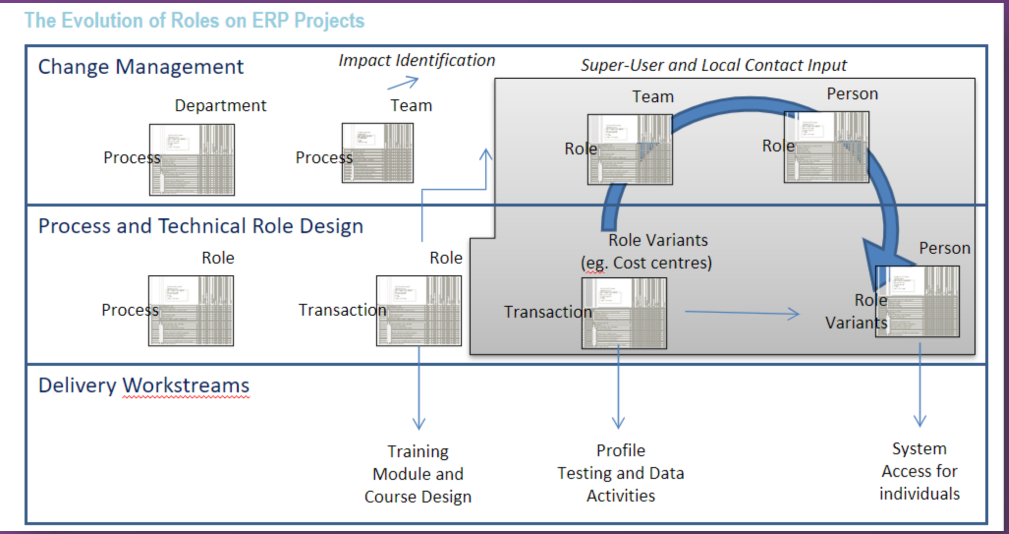
People to Organisation Mappings

Redesign organisation and roles

- To resolve responsibility issues relating to who performs which roles
- To engage the business on decisions about access and training

Accelerator – Excel Maps

- Process to Team
- Process to Role
- Transaction to Role*
- Variant to Role*
- Role to Team



Top Tips:

- The DNA of an organization is made up of activities that are owned by people, so groupings of activity to role, role to job and job to team make up the key decisions about organization design.

*technical documen

Organisation and Job

ORG 3

Organisation Options and Impacts

Develop profiles layer by layer

- To show proposed groupings of the organisation with high level organisation charts and FTE numbers
- To show the high level impacts of the options identified

Accelerator – PowerPoint Maps / Options Summaries

- Powerpoint maps
- Powerpoint representations of the organisation, outlining key scenarios

Link to Template

Top Tips:

- The best organizational design projects are the ones where subject matter experts from the business areas have had a say in how things need to be structured – but it's a balance as often these people need to be under NDA initially due to the sensitivity of the projects.

Organisation and Job

ORG 4

HR Actions Tracker

Plan and monitor business & HR actions

- Provision of role based information to support assessment and recruitment activity
- Integration of HR actions into change management activities
- Weekly 2 hour discussions with HR

Accelerator – HR actions trackers

- A number of HR related activities need to be tracked ranging from recruitment; assessment through to tracking consultation processes for people leaving the organisation.


VERSION 2

JANUARY 28, 2015

SEVERN TRENT WATER

Link to Template

Top Tips:

- Engage with HR early in the project to understand what the types of HR interventions will be that will be required. These need to be monitored and tracked during the delivery stages.

Organisation and Job

ORG 5

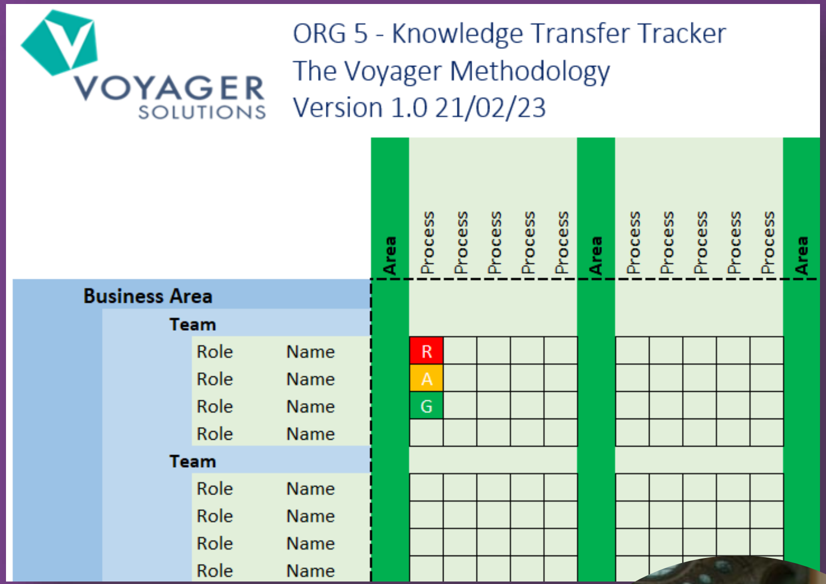
Knowledge Transfer Tracker

Launch and monitor handover

- Where there is a significant change in personnel from the old organisation to the new one, there is a lot of work to do to ensure that every activity is handed over and tracked

Accelerator – Knowledge Transfer Tracker

- On some clients a master log is used to ensure that every task is tracked in terms of who holds the knowledge today and who they need to handover the knowledge to.



Top Tips:

- Don't take knowledge of key personnel who are leaving the organization for granted! You may well be losing a valuable skill-set that you only need at some times
- If there is concern that key knowledge will be leaving the building before the new people come on board you need a good plan to capture it very early to avoid gaps!

Organisation and Job Impacts – Case Studies

[VSL ORG 5 - Knowledge Transfer Template.xlsx]

CW - ORG 5

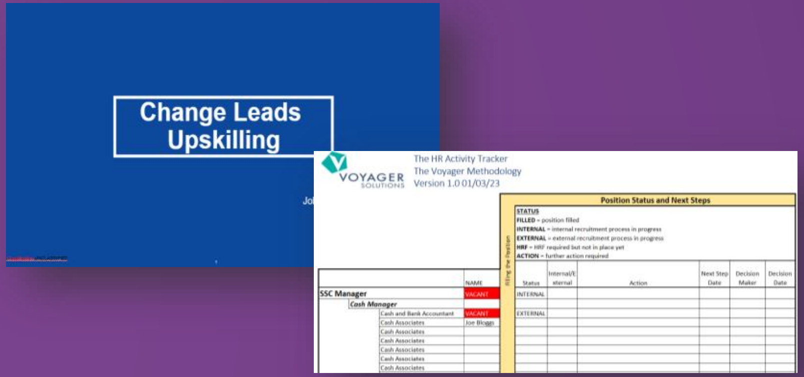
Job and Process Impacts

JOB 1

Identify Major Impacts

Identify major HR and Org impacts

- Identify any HR or organisation impacts with a lead time - putting into place new recruitment policies, downsizing or union engagement can be a time consuming process



Accelerator – Heatmap Matrix

- A heatmap matrix maps people to process and help us to identify where impact discussions are required.

Link to Template

Top Tips:

- If you start to identify major HR impacts from an early stage, remember that these may be controversial so should only be shared with a limited number of people – some of it is highly confidential (e.g. headcount impacts)

Job and Process Impacts

JOB 2

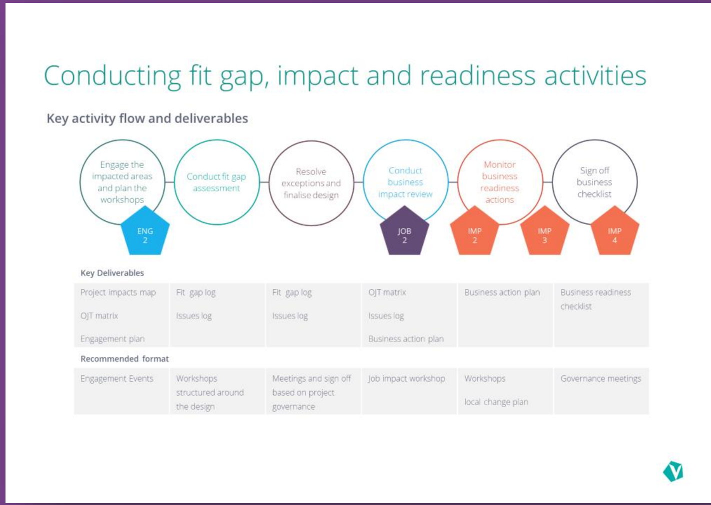
Job Impact Analysis

Conducing Job Impact Analysis

- May be required, depending on initial assessment and strategy
- Usually need design to be locked down to do effectively
- Fit Gap analysis is applying the design to existing business areas and seeing how well it fits/deviates, and establishing how far specific business areas can deviate from the central design

Accelerator – Impact Checklist, Workshop Schedule

- A schedule of workshops / topic areas is created. Workshops are conducted to identify the key impacts, decisions and actions.



Conducting fit gap, impact and readiness activities

Key activity flow and deliverables

Key Deliverables

Project impacts map OJT matrix Engagement plan	Fit gap log Issues log	Fit gap log Issues log	OJT matrix Issues log Business action plan	Business action plan	Business readiness checklist

Recommended format

Engagement Events	Workshops structured around the design	Meetings and sign off based on project governance	Job impact workshop	Workshops local change plan	Governance meetings

Top Tips:

- Most projects need the impact, actions and monitoring stages of the methodology – the Fit Gap approach is often driven by the client or the technical consulting company – we do not typically drive this stage but its good to be involved in it as it's a great place to capture impacts

Link to Temp

Job and Process Impacts

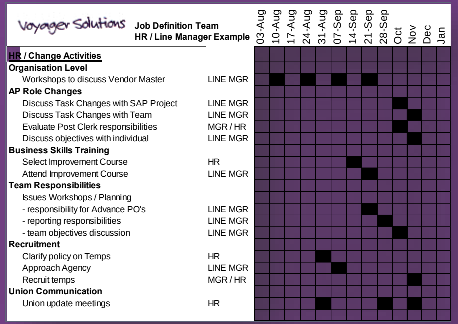
JOB 3

Plan and monitor actions

Plan and monitor business & HR actions

- Turn the results of previous analysis into actions to be completed in the business areas
- Either weave into existing implementation process, or set up our own one to track HR actions we're involved with

Accelerator – Business Action Plan JOB 3 - The Business Action Plan.xlsx


Voyager Solutions Job Definition Team HR / Line Manager Example

		03-Aug	10-Aug	17-Aug	24-Aug	31-Aug	07-Sep	14-Sep	21-Sep	28-Sep	Oct	Nov	Dec	Jan
HR / Change Activities														
Organisation Level														
Workshops to discuss Vendor Master	LINE MGR		■		■		■		■					
AP Role Changes														
Discuss Task Changes with SAP Project	LINE MGR										■			
Discuss Task Changes with Team	LINE MGR											■		
Evaluate Post Clerk responsibilities	MGR / HR										■			
Discuss objectives with individual	LINE MGR											■		
Business Skills Training														
Select Improvement Course	HR							■						
Attend Improvement Course	LINE MGR								■					
Team Responsibilities														
Issues Workshops / Planning														
- responsibility for Advance PO's	LINE MGR								■					
- reporting responsibilities	LINE MGR									■				
- team objectives discussion	LINE MGR										■			
Recruitment														
Clarify policy on Temps	HR					■								
Approach Agency	LINE MGR						■							
Recruit temps	MGR / HR											■		
Union Communication														
Union update meetings	HR					■				■		■		

Link to Template

Top Tips:
- If a Business Implementation process exists on the project, try to build the business action plan into this to avoid duplication

Job and Process Impacts

JOB 4

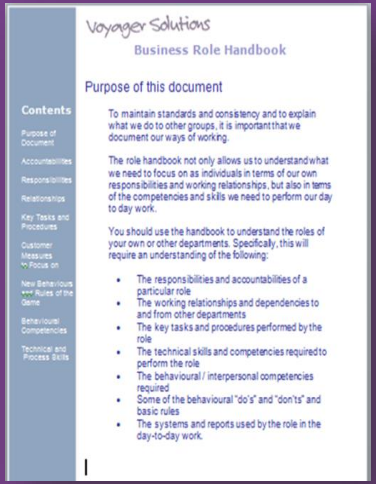
Engage leaders to drive actions

Engage leaders to deliver actions for key roles

- Recommendations from previous steps may require new roles to be established
- Leaders who need to be engaged in the impacted areas are often Line Managers or HR

Accelerator – Role Handbook Documentation

- Format to articulate what new roles need to look like



Voyager Solutions

Business Role Handbook

Contents

Purpose of this document

To maintain standards and consistency and to explain what we do to other groups, it is important that we document our ways of working.

The role handbook not only allows us to understand what we need to focus on as individuals in terms of our own responsibilities and working relationships, but also in terms of the competencies and skills we need to perform our day to day work.

You should use the handbook to understand the roles of your own or other departments. Specifically, this will require an understanding of the following:

- The responsibilities and accountabilities of a particular role
- The working relationships and dependencies to and from other departments
- The key tasks and procedures performed by the role
- The technical skills and competencies required to perform the role
- The behavioural / interpersonal competencies required
- Some of the behavioural "do's" and "don'ts" and basic rules
- The systems and reports used by the role in the day-to-day work.

Top Tips:

- Role handbook formats help managers and HR understand what expectations we have of future roles in the "to be" model – for technology programmes they are ROLES not JOBs but can be mapped to Jobs if required.

Job and Process Impacts

JOB 5

Manage changes and educate

Make the changes and educate key roles

- Formats to educate impacted people on the changes to their role and/or ways of working

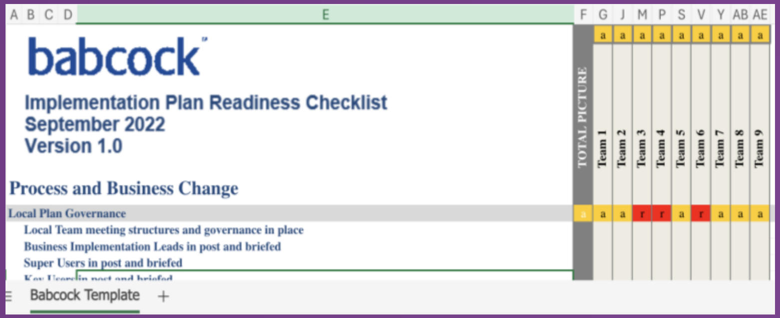
Accelerator – Start Stop Continue Documentation

- Stop Start Continue format can be used at multiple different levels – from 1:1 conversations between Managers and their reports, to entire departments

Top Tips:

- The stop start continue guide is a great catch all for transactional and more detailed impacts – if you find a way for them to be cascaded by team leaders and line managers, you will get great engagement and buy in to the changes

Job and Process Impacts – Case Studies

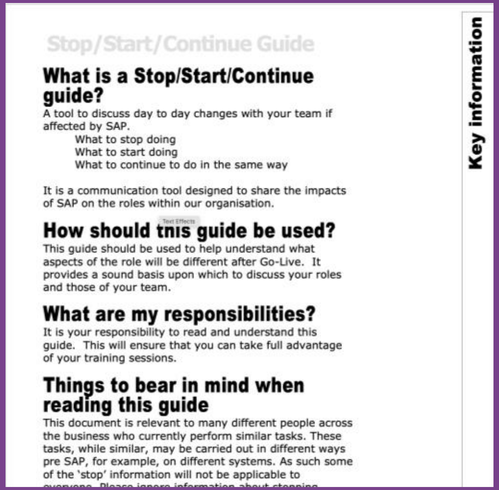

babcock

Implementation Plan Readiness Checklist
September 2022
Version 1.0

Process and Business Change

	TOTAL PICTURE	Team 1	Team 2	Team 3	Team 4	Team 5	Team 6	Team 7	Team 8	Team 9
		a	a	a	a	a	a	a	a	a
Local Plan Governance	a	a	a	r	r	a	r	a	a	a
Local Team meeting structures and governance in place										
Business Implementation Leads in post and briefed										
Super Users in post and briefed										

Babcock Template


Stop/Start/Continue Guide

Key information

What is a Stop/Start/Continue guide?

A tool to discuss day to day changes with your team if affected by SAP.

What to stop doing
What to start doing
What to continue to do in the same way

It is a communication tool designed to share the impacts of SAP on the roles within our organisation.

How should this guide be used?

This guide should be used to help understand what aspects of the role will be different after Go-Live. It provides a sound basis upon which to discuss your roles and those of your team.

What are my responsibilities?

It is your responsibility to read and understand this guide. This will ensure that you can take full advantage of your training sessions.

Things to bear in mind when reading this guide

This document is relevant to many different people across the business who currently perform similar tasks. These tasks, while similar, may be carried out in different ways pre SAP, for example, on different systems. As such some of the 'stop' information will not be applicable to

Babcock – JOB 3

TFL – JOB 5 (Folder Link)

GLD JOB 5 - TFL SAP Procurement Stop, Start, Continue

Sources

VOYAGER
SOLUTIONS

Engagement and Learning – Case Studies and Templates

Section	Accelerator Code	Title of Deliverable	Purpose/usage	Gold Case Study Example	Template Link
Engagement and Learning	ENG 1	Audience and Channel Analysis	A matrix that lists audiences that require learning/engagement and the complexity of said learning/engagement, to act as a jumping off point for scheduling events.	GLD ENG 1 - RRENG PPDI Training Needs Analysis 16.12.16 Signed off FINAL (003).xlsx	ENG 1 - Audience and Channel Analysis.xlsx
Engagement and Learning	ENG 2	Engagement and Learning Plan	A matrix that lists all upcoming learning events, their dates and the status of their preparation.	GLD ENG 2 - NMNA Training Strategy 2017 v2 0.pptx	ENG 2 - Engagement and Learning Plan.xlsx
Engagement and Learning	ENG 3	Catalogue of Brilliant Formats	A catalogue to 'sell' evenets and courses to stakeholders who are recipients, and to people who will need to be involved in crating the content.	GLD ENG 3 - Training Standards and Planning	/
Engagement and Learning	ENG 4	The Development Plan and Course Mappings	A matrix that tracks the projects of individual learning workshops.	GLD ENG 4 - Training Delivery Plan and Final Timetable	ENG 4 - Development Plan and Course Mappings.xlsx
Engagement and Learning	ENG 5	Role-Based Materials	Numerous materials to track the project at a role level.		FOLDER TO DO