



# 25 KEY ORGANISATIONAL CHANGE & BUSINESS IMPLEMENTATION ACCELERATORS TO DRAMATICALLY IMPROVE YOUR PROGRAMMES



A GUIDE FOR PROGRAMME SPONSORS & CONSULTANTS WHICH INCLUDES:  
Operating Model Transformation, Technology Transformation & Third Party Outsourcing

Voyager Solutions | ALIGN | PLAN | IMPLEMENT

## BACKGROUND AND HOW TO USE BOOKLET

### THIS IS HOW WE DO IT

Over the last 14 years, we have had the pleasure of working with great clients across a number of industries and most regions of the world. Our journey together often starts when they have made a decision to undertake one of 3 types of journey.

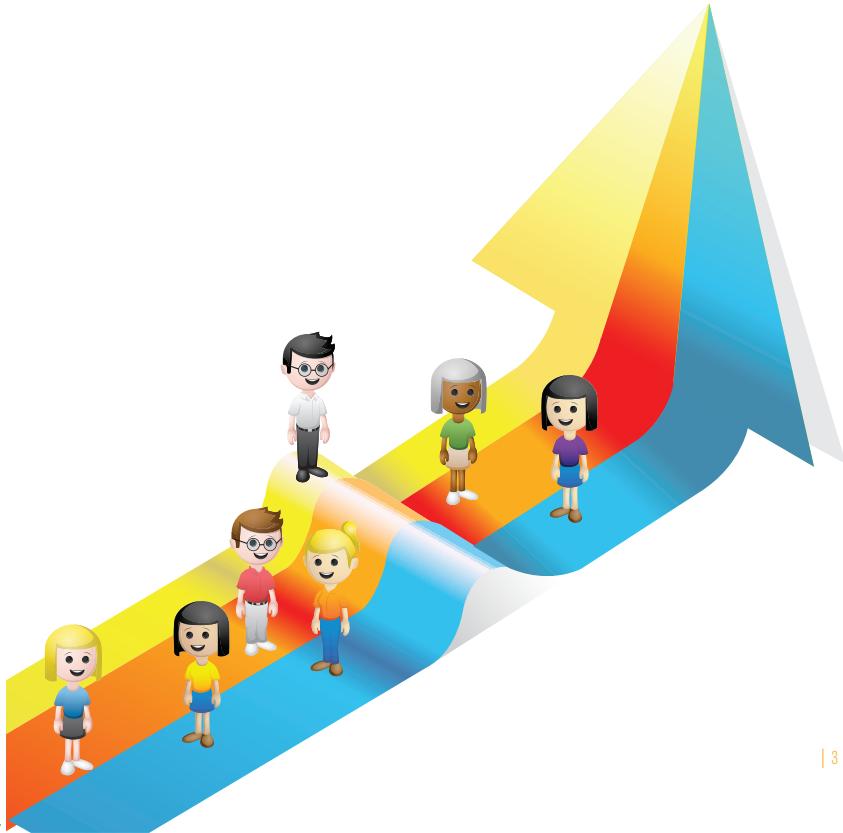
What typically happens next forms the structure of this guide. We initially discuss the business case and drivers for the project and what key activities they currently have planned. They are often using a specialist company who have provided a lifecycle which will form the structure of the journey.

At this point we often discuss the change risks and opportunities that they face on those types of journey, and how we can use the 25 accelerators in this guide in response to these.

Decision makers and project sponsors should use this guide to understand the change risks, and what types of activities can minimise them.

HR professionals, consultants and change management practitioners should use the accelerators to plan activities that will minimise these risks and maximise the benefits of such journeys.

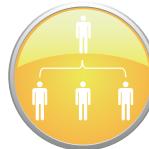
Our consultants use these techniques everyday to support some of the biggest global companies in the world – we hope that you are able to use them in your journeys too.



## TYPES OF CLIENT JOURNEYS

THERE ARE 3 BROAD PROJECTS THAT WE OFTEN SUPPORT

**Operating Model Journeys** focus on defining an organisation from strategy to purpose; a set of operating principles and the enabling changes on people, process and technology. Operating Model Journeys often precede the other 2 journey types (Technology Driven & Outsourcing). Typical Operating Model Journeys include implementation of Shared Services, Centres of Excellence, Business Partner models or Business / Process Transformations.



**Technology Driven Journeys** focus on implementing a packaged solution, normally across a number of functions, businesses and geographical areas. Enterprise Resource Planning (ERP) systems are typical programmes which deliver Oracle, SAP, JD Edwards or other software. Application based Cloud implementations are also examples of these.



**Outsourcing Journeys** are often based around allowing a third party organisation to manage a defined set of processes or services. Finance, HR and IS are well established functions that use this model, but it can apply to almost any function.







## BACKGROUND - OPERATING MODEL JOURNEYS

### OPERATING MODEL JOURNEYS HAVE A NUMBER OF FORMS

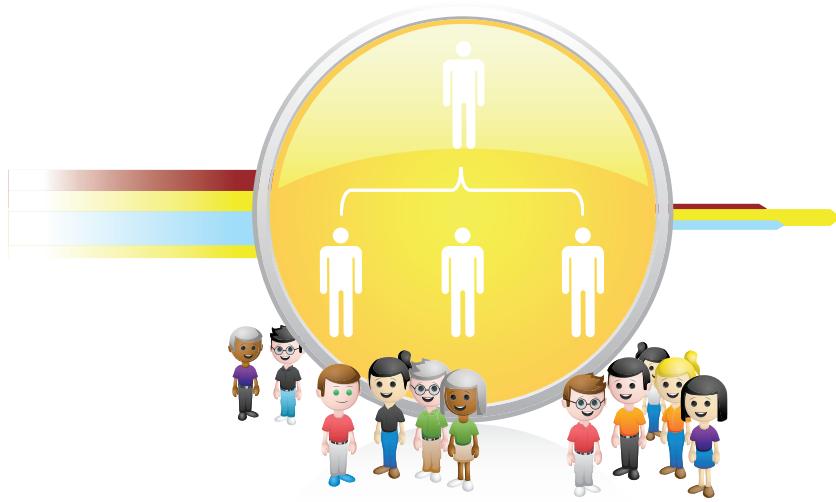
A new operating model could be a set of processes or services, a pre-defined organisation structure, or a standard industry model.

The types of operating model journeys that we have supported over the years are varied, but include:

- *Finance Shared Services*
- *HR Shared Services*
- *IS Shared Services*
- *Centres of Excellence*
- *Service Model Delivery*
- *Business Partner Role Implementations*
- *Specific structures such as Health and Safety Organisations or Diversity Organisations*

The lifecycles for implementing these are equally as varied, but they follow a typical journey.

# OPERATING MODEL JOURNEYS





## BUSINESS CASE FOR OPERATING MODEL JOURNEYS

### THE COMPELLING CASE FOR AN OPERATING MODEL JOURNEY

Clients typically improve or change operating models for the following reasons:

**To adopt best practice standard models.** There are many industry standard organisational models, process models and ways of working. These are seen to represent best practice in terms of efficiency and effectiveness.

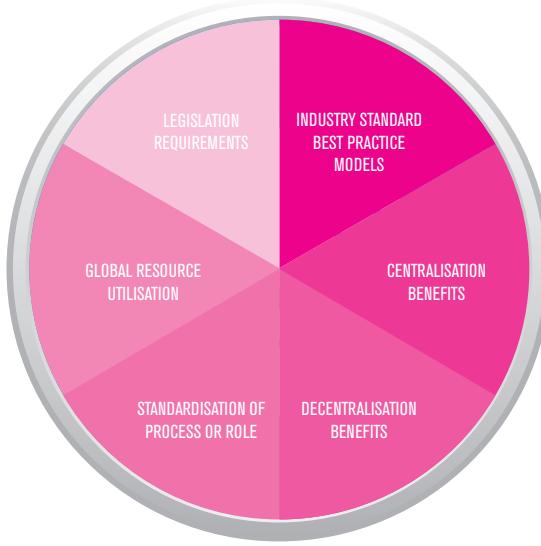
**Centralisation or decentralisation.** The debate about whether to pool resources or to have local expertise is one which is constantly shifting. The business case drivers for these include resource economies of scale, the cost of process handovers, the customer experience, and the speed and responsiveness required.

**Standardisation & global resource utilisation.** Large organisations often have significant variation in services, processes and roles across geographies or divisions. Agreeing and implementing the 'best' way of doing things can achieve significant improvement in performance and efficiency in terms of being able to pool and share resources.

**Customer service improvement & legislation.** Changing the organisation and the business processes can improve service to both external and internal customers.

**Compliance and legislation.** Ensuring that operating procedures and ways of working are consistent across the organisation in terms of risks and controls can also provide the drivers for such journeys.

## OPERATING MODEL PIECHART





## OPERATING MODEL JOURNEY – ORGANISATIONAL ACTIVITIES

### TYPICAL ACTIVITIES

For an operating model change which is focusing on an organisational model, the typical activities planned are varied, but often follow the pattern outlined in the diagram.

A vision stage will confirm the new principles, based on the company strategy and objectives, which are the basis of the change. The decision making mechanisms (governance) are agreed, and the specific problem areas or gaps are documented.

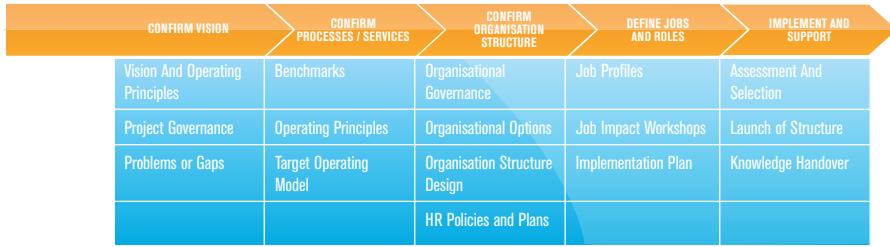
A process stage ensures that everyone is clear on what the future state should look like in terms of measures and broad operating principles. Often a framework process model, called a Target Operating Model (TOM), is used at this stage.

The organisation design stage will use the process models as a basis to layout organisational structure options, and use the decision making processes (governance) to make the structural decisions. Human Resources (HR) make plans for impacted business areas.

The jobs and roles within these organisational structures can be designed, often layer by layer, and role profiles (job descriptions) developed. A launch / implementation plan can also be defined.

During implementation, HR activities such as recruitment, redeployment and assessment take place, the new organisation structure is launched, and responsibilities are transferred.

## OPERATING MODEL JOURNEY – ORGANISATIONAL LIFECYCLE





## OPERATING MODEL JOURNEY - PROCESS ACTIVITIES

### TYPICAL ACTIVITIES

For an operating model change which is focusing on a services process model, the typical activities often follow the pattern outlined in the diagram.

A vision stage will confirm the new principles, based on the company strategy and objectives, which are the basis of the change. The decision making mechanisms (governance) are agreed, and the specific problem areas or gaps are documented.

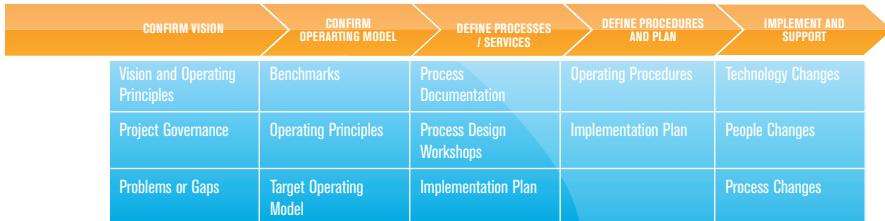
An operating model ensures that everyone is clear on what the future state should look like in terms of measures and broad operating principles. Often a framework process model, called a Target Operating Model (TOM), is used at this stage.

The process design stage will take the TOM framework, and conduct a series of workshops for each area, to design or adapt the process model. An implementation approach is also defined.

From this, procedures can be developed, and a more detailed implementation plan is put together.

During implementation, technology and system changes are made, people changes such as job change / training and process changes are rolled out through operating procedures or education.

## **OPERATING MODEL JOURNEY – PROCESS LIFECYCLE**



## MITIGATING OPERATING MODEL RISKS USING ACCELERATORS

### RISK / ISSUE

**Focusing on only the design can be false economy.** Operating model changes often focus on a set of processes or a part of the organisation. As they are delivered into an operating business, it is costly to cut corners and not sort out people changes that are vital to the business case.

**The wider operating model impact needs to be considered.** Operating models are often represented as either process, organisational or technical models, but rarely all 3 at once. Failure to recognise the interdependencies and the 'bigger picture' can lead to compromises and can sink the business case.

**Operating models need to be practical.** Some operating models are great in theory, but fall down in practice where they need to be applied to an operating organisation. This can lead to compromises in the design, and costly delays.

### ACCELERATORS



#### Change Programme Management

Use the planning tools in this section to identify the full scope of the operating model change in terms of people, process and technology and to create a practical change management plan to align all the required components.



#### Process Change

Use the practical process format outlined in this section to ensure that everyone is clear on process standards and that they can be used as a basis to consider impacts. Where improvements are required, use flightdecks to deliver them.



#### Organisation, Job and Role Alignment

Use the organisation and role design tools to deliver the organisation that is required, layer by layer, with maximum stakeholder involvement. Use the launch tools to make sure that the people changes are launched with a bang and that they deliver.



## MITIGATING OPERATING MODEL RISKS USING ACCELERATORS

### RISK / ISSUE

Lack of engagement will delay the project and reduce the benefits. Engagement needs to come from leaders who contribute resources, effort and key decisions, and from the people who are part of the new model. Failure to engage causes delays and business case shortfalls.

The changes need to deliver specific activities at specific points. Many operating model projects fail because they drift and do not deliver the step change that was first planned for. The bigger the project and business case, the more people directly and indirectly impacted that will need to contribute.

### ACCELERATORS



#### Engagement and Learning

Use these tools to deliver a great engagement and learning programme from leaders who will need to sponsor the changes through to every role that will need to do something different – minor or major.



#### Business Implementation

Use these tools to understand the impact of the operating model on the businesses, and to involve and engage businesses with visible Go-Live checklists to ensure that every detail is delivered.



## TECHNOLOGY JOURNEYS BACKGROUND

### TECHNOLOGY JOURNEYS HAVE A NUMBER OF FORMS

The whole range of technology journeys that clients might embark on range from implementing a single system change within a single department, through to a global Enterprise Resource Planning (ERP) system that impacts every part of the business.

The types of technology journeys that we have supported over the years are varied, but include

- *ERP Implementations such as Oracle or SAP*
- *Single systems across customer, planning, finance, procurement, manufacturing, supply chain, HR and IS*
- *Global ERP projects across every world region*
- *Upgrades*
- *Cloud based systems*
- *Employee Self Service*
- *Managers Desktop*
- *e-Procurement*
- *Forecasting, Planning and Scheduling Systems*

# TECHNOLOGY JOURNEYS





## BUSINESS CASE FOR TECHNOLOGY JOURNEYS

### THE COMPELLING CASE FOR A TECHNOLOGY JOURNEY

Clients typically upgrade, improve or change technologies for the following reasons:

**Optimised Resource Planning.** The business case for many ERP systems centres around eliminating duplication, improving the planning and use of all types of resources including people, assets, products and services. Specific benefits of this include faster response times, reduced inventory, headcount reduction and pooling of resources.

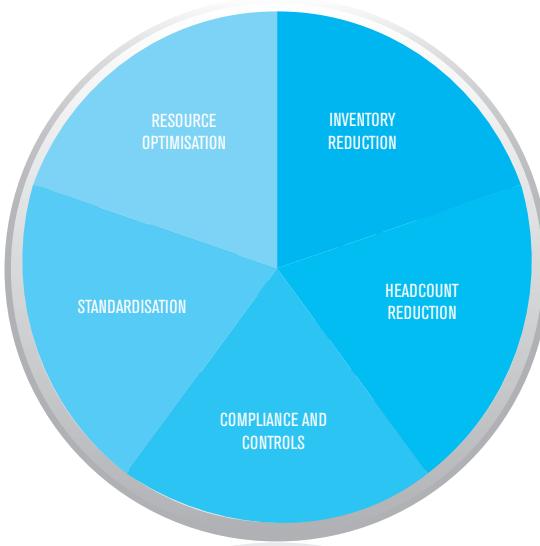
**Enablement of Operating Model and Third Party Outsourcing Journeys.** We often hear the word enabler being used, as technologies are one of the components that are often required to deliver the business case for the operating model and third party outsourcing changes.

**Standardisation.** Using common technologies across a set of countries or businesses has secondary benefits which include reduced costs of pooled resources, gaining revenue benefits from combining customer activity, and being able to manage the company as a common pool of resources.

**Customer Improvements.** Many technologies are implemented to improve the customer experience, and to use customer knowledge to develop revenue opportunities further.

**Data and Information.** Often technologies are deployed to improve the decision making of a company, which can contribute to both costs and revenue. In some cases, technologies are deployed to provide self service access to speed up data entry for employees, managers, customers and suppliers.

## TECHNOLOGY JOURNEY





## TECHNOLOGY JOURNEYS – TYPICAL ACTIVITIES

### TYPICAL ACTIVITIES

For a technology change, the typical activities often follow the pattern outlined in the diagram.

A vision stage will confirm the new principles, based on the company strategy and objectives, which are the basis of the change. The decision making mechanisms (governance) are agreed, and the specific problem areas or gaps are documented.

A conceptual design ensures that everyone is clear on what the future state should look like in terms of process, data, interfaces, systems and a technical architecture often showing a system map. Process workshops are often used to validate the future design and capture requirements. An implementation approach covers how the system will be rolled out to businesses.

The standard design stage consists of a series of workshops for each area, to design or adapt aspects of the solution. Detailed requirements are locked down.

On some projects, the last 2 stages are repeated for each individual roll-out, in which case a fit and impact workshop would be conducted to understand local variations. A local design is created for each area and implementation planning occurs for every area.

During implementation, data is prepared and transferred, local testing occurs and a cutover will ensure that all the system, data and interfaces are changed. Support may also need to be defined and provided.

## TECHNOLOGY JOURNEY LIFECYCLES

PLAN AND PREPARE		CONFIRM EXISTING SERVICES		SHADOW AND PREPARE	IMPLEMENT SERVICE TRANSFER	STABILISE AND SUPPORT
Vision and Operating Principles	Technical Architecture	Detailed Design	Fit and Impact Workshops	User Testing		
Project Governance	Conceptual Design	Design Workshops	Local Design	Data Preparation		
Problems or Gaps	Implementation Strategy	Requirements	Implementation Plan	Data Clean		
	Design Workshops		Testing	Cutover		
	Gaps and Requirements				Support	

## MITIGATING TECHNOLOGY JOURNEY RISKS USING ACCELERATORS

### RISK / ISSUE

Technology projects can see the people element as a delivery barrier. Technology projects over the years have improved in focusing on processes as well as systems. But many still do not consider the full scope of people and indirect process impacts. Gaps can be misaligned and expensive to operate.

**Process models beyond the technical documents may be needed.** The future state design documentation that is used in technology projects does not always cover the full scope of the impacted businesses. Indirect process changes are often needed to ensure that the full business case can be delivered.

**Full scope technology projects often need a restructure to be successful.** Technologies often require the business to make decisions about restructuring departments or about who will perform which roles. If we don't address these issues, the technology can often be a more costly way of running the same way.

### ACCELERATORS

#### Change Programme Management

Use the planning tools in this section to identify the full scope of the services impacted and the indirect process impacts. The tools should be used to plan change for all impacted stakeholders.



#### Process Change

Use this section to identify the documentation that will be needed as a basis for the impact discussions, ways of working documentation and communicating role based training. Use the future state design documents as a basis for this.



#### Organisation, Job and Role Alignment

Use the job and role impact alignment section to understand the impacts on key roles, and to consider changes to responsibilities, relationships, objectives and behaviours that will be needed to deliver the business case.





## MITIGATING TECHNOLOGY JOURNEY RISKS USING ACCELERATORS

### RISK / ISSUE

If you don't engage the people, they may not use the system as planned. Technology projects require engagement during the project, to design and test the system, and afterwards to make sure that key roles do what they need to when they run the system. This avoids project delays and unplanned operating costs.

Getting early visibility of business readiness gives us time to fix problems. Technology projects will need people, process and system actions to take place in the impacted businesses for them to be a success. The business case will assume that all these activities have been done for a successful Go-Live.

### ACCELERATORS

#### Engagement and Learning

Use this section to plan for the activities that are needed to engage people who need to support and sponsor the project, and those who will need to understand the future state principles, processes, reports and ways of working.

#### Business Implementation

Use this section to identify those people who will need to sign off Go-Live, and to plan the implementation activities that will be required to deliver the people, process, technology and support changes that the businesses will need to do.



## OUTSOURCING JOURNEYS - BACKGROUND

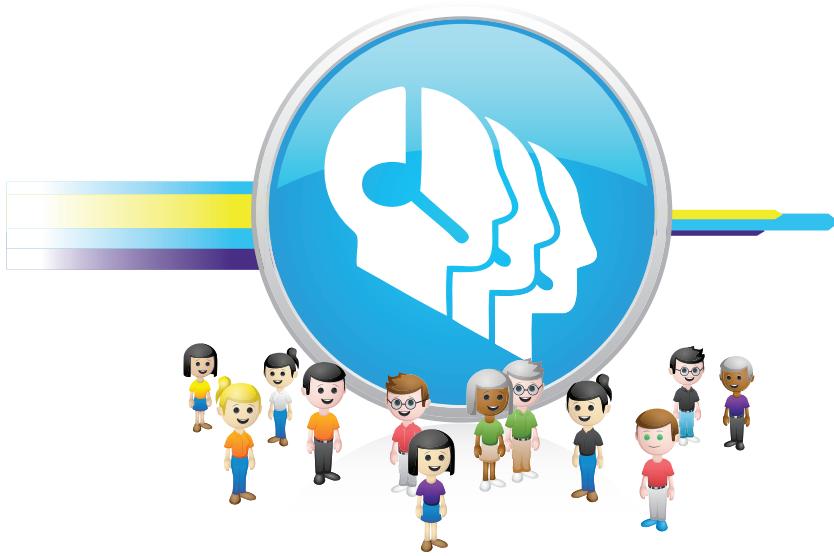
### THIRD PARTY OUTSOURCING JOURNEYS HAVE A NUMBER OF FORMS

A client undertaking an outsource journey is often transferring processing / service provision for a defined set of services to a third party. Many of the outsource providers have geographical hubs where they are able to operate cost effective centres (e.g. India, Poland and Brazil). Outsourcing became popular 20 years ago, in Finance, but are increasingly supporting other functions such as HR and IS.

Voyager have supported projects which often involve 50+ countries and four hubs on this basis. Internal Shared Service Centre implementations have some outsource characteristics as they migrating activity to a centre. The types of outsourcing journeys that we have supported over the years are varied, but include:

- *Finance Business Process Outsourcing (BPO)*
- *HR Outsourcing (HRO)*
- *Service Outsourcing*
- *Internal Hubs and Centres of Excellence*
- *Facilities Management Outsourcing*

# OUTSOURCING JOURNEYS





## BUSINESS CASE FOR OUTSOURCING JOURNEYS

### CLIENTS OUTSOURCE FOR A NUMBER OF REASONS

**To deliver direct resource savings.** An obvious benefit of outsourcing is that economies of scale are achieved using a third party provider who supports many organisations. The economies of scale achieved reduce costs relating to people and assets.

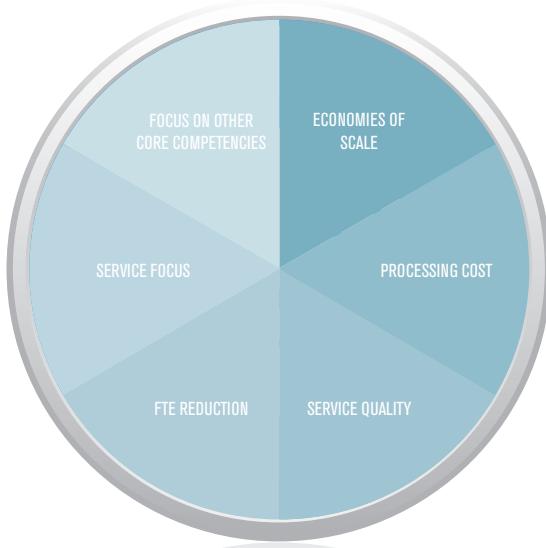
**To support a new global operating model.** Some organisations may have already outsourced some functions, and are able to further standardise using the same provider.

**To take transaction processing one step further.** Many organisations that have implemented processing centres as part of other operating model changes and can reduce costs further using these models.

**To further deliver a service based organisation.** Some organisations outsource so that they can focus on service based operations in some functions, while focusing on the core competencies.

**To standardise and simplify as part of a growth plan.** The business case for this is based on cost avoidance, as a rapid expansion might be planned or even for a start up company, who can set up with an optimised model from day one.

## OUTSOURCING JOURNEY PIECHART



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## OUTSOURCING JOURNEYS – TYPICAL ACTIVITIES

### TYPICAL ACTIVITIES

For an outsourcing journey, the typical activities often follow the pattern outlined in the diagram.

During preparation, the scope of services to be transferred is agreed, and often a catalogue of services is used to agree this. The 'sending' organisation is analysed in terms of how it fits to this model, and a service contract and approach confirmed.

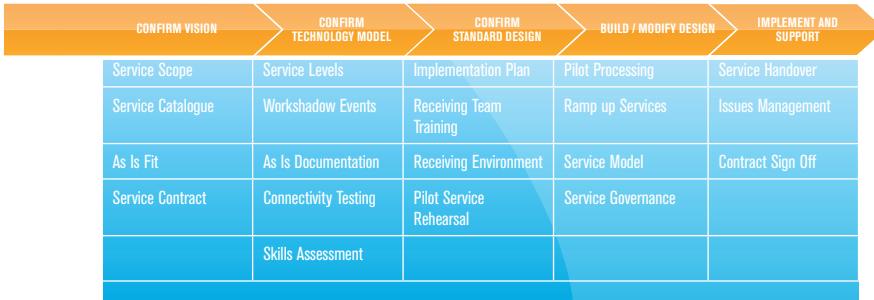
In the next stage, the 'receiving' organisation will often workshadow the sending organisation, and documentation is reviewed / created. Where access to systems may be required by a third party, this is assessed. The skill requirements of the 'receiving' team may also be assessed at this stage.

An implementation plan is created, and the receiving team will attend training. The receiving environment will be prepared including systems, process, facilities and people. At this stage, there may be pilot tests, where aspects of the service are simulated.

Services are then transferred in further pilots, which may be conducted stage by stage, and the service model is constantly assessed and tested. The receiving service teams will start following operational processes, including service monitoring and issues resolution.

At a defined point, the service is formally handed over to the receiving team, and if a third party is involved, this can be a contractual stage.

## OUTSOURCING JOURNEYS LIFECYCLE



## MITIGATING OUTSOURCING JOURNEY RISKS USING ACCELERATORS

### RISK / ISSUE

We often focus on the receiver of the activities only. When a company embarks on an outsourcing programme, the receiving organisation can often push hard to deliver a plan, which does not consider the full scope of change management activities that will be required to run it efficiently.

If you don't fix it before you send it, you will pay more to run it. If you move something that is inefficient to another place, you will either pay the receiving organisation to fix it, or you will pay them more to run it. There is still likely to be an end to end process flow across both organisations which will need to operate effectively.

The reduced "sending" (retained) organisation still has a structure and activities. The business case for moving activities will only be delivered if all roles operate effectively including those who will manage the service, and the touchpoints. Organisation restructure and headcount reduction is costly if its not proactively managed.

### ACCELERATORS



#### Change Programme Management

Use the planning tools in this section to identify the full scope of the services impacted and the indirect process impacts. The tools should be used to plan change for all impacted stakeholders, including the sender and receiving organisation, as well as clients.



#### Process Change

Use this section to identify the documentation that will be needed as a basis for the impact discussions, ways of working documentation and other change dependencies.



#### Organisation, Job and Role Alignment

Use the organisation design sections to redesign impacted areas of the organisation such as the retained organisation, and the job and role impact sections to identify how key roles will be impacted by the new processes



## OUTSOURCING JOURNEY ACCELERATORS

### RISK / ISSUE

#### **Don't forget the customers and the support roles.**

Engagement of the businesses customers during and after the Go-Live is critical. Engagement of all the impacted stakeholders also needs to be managed to avoid additional support costs or project delays.

#### **Managing a series of Go-Lives is essential.**

Outsourcing projects often deliver in a series of stages as small pieces of activities are transferred in a controlled way to test the model before the ramp up. Planning all the people, process, technology and support changes is key.

### ACCELERATORS

#### **Engagement and Learning**

Use this section to develop a great engagement plan to engage and train the receivers of the new activities, the people who will need to support it, the customers and those retained in the sending organisation.

#### **Business Implementation**

Use this section to identify those people who will need to become involved at the various ramp up and Go-Live stages, and ensure that everyone is clear on the criteria required to handover processing at every project stage.

## THE ACCELERATORS

### ACCELERATORS ARE THE TOOLS THAT MITIGATE RISK

In the remaining section of this guide, we have included 25 accelerators which are tips and tools to address specific change risks and opportunities identified in the journey sections. Each of the 3 journey maps will indicate where you should use them for a particular project type, but you should use this section as a reference guide, rather than read it end to end.

Broadly, the sections follow a logical sequence, based on the 5 key areas of change activity.

Change programme management identifies the change risks and opportunities for any type of project, and how to plan the organisational change and business implementation activities.

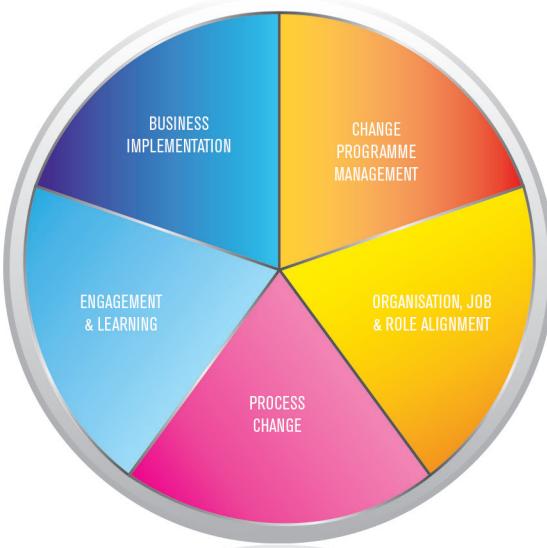
Process change is often at the core of organisation and job design, and is sometimes conducted as a standalone activity.

Organisation job and role activities will identify the impacts of a project on the organisation and its jobs and roles, and provides tools for making key decisions, redesigning, and implementing the changes

Engagement and learning tools provide a framework for planning and delivering any type of communication, engagement or learning activities.

Business implementation is used to engage those business areas in ensuring that they are bought into and are ready for the change.

## KEY ACCELERATORS AREAS



## CHANGE PROGRAMME MANAGEMENT

### KEY ACCELERATORS

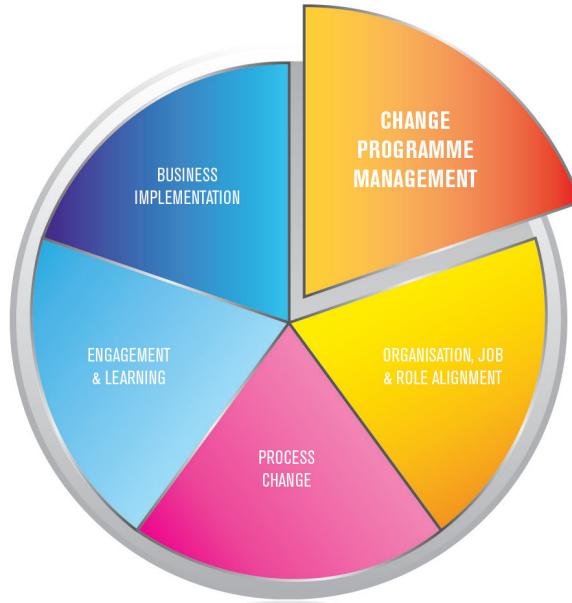
Use these accelerators to plan an effective change programme across the full scope of processes / services and people impacted.

*CHG 1 – Identify impacted processes and people*

*CHG 2 – Identify change risks and opportunities*

*CHG 3 – Publish a great change plan*

## *CHANGE PROGRAMME MANAGEMENT*



## **CHG 1 - IDENTIFY IMPACTED PROCESSES AND PEOPLE**

### **CONSIDER THE ENTIRE PROCESS AND PEOPLE SCOPE AS A FIRST STEP**

We often deal with change issues on a reactive basis, setting up meetings in response to problems.

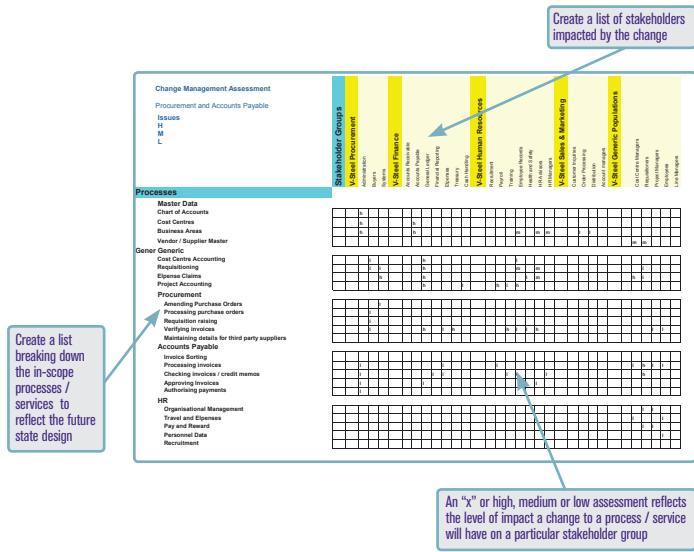
Understanding the full scope of process change, functionality or services, and then comparing that to all impacted stakeholders, Internal and external is key.

This shapes the change approaches, or at least identifies where not to spend the time – to decide on calculated risks.

**CHG 1** - As a first step, ensure that you understand the full scope of the processes or services that are being impacted. Talk to the people who understand the future processes/services design, and those who understand the impacted departments and stakeholders, and build up a matrix which links the two together. This matrix becomes the basis of your whole change approach – and as a new change manager is also great for your induction to the project.

## STAKEHOLDER MAP TO PROCESS TEMPLATE

Conduct workshop sessions with people who understand the future state processes/services. For third party outsourcing projects, this will be the service provider, for operating model changes, this will be the process team members, and for technology changes, this will be the designers. Involve key people from the impacted business and organisation charts to build up the mapping.



## **CHG 2 - IDENTIFY CHANGE RISKS AND OPPORTUNITIES**

### BUILD A PRACTICAL LIST OF THINGS THAT NEED TO BE SORTED OUT

By the time that the change people arrive on a project, there is usually a central risks and issues log in place. It's amazing how many change risks and opportunities can be identified up front by getting the views of experienced process team members, sponsors, business contacts and third parties. From this, a section of the central risks and issues log, or a new change log, can be created.

**CHG 2 -** Use the matrix with the processes and people to identify the change issues and opportunities. Consider areas where organisational decisions will need to be made and areas where key jobs and roles will need to change (in terms of accountabilities, relationships, objectives, skills, behaviours and competencies). Identify where communication, training and engagement will be required, and where businesses or countries will need to prepare for changes.

## CHANGE RISKS AND OPPORTUNITIES LOG

Build up a log of change risks and opportunities and start to categorise them into certain types of change interventions (Cross Organisation, HR issues, Job and Role issues, Training, Communication, Process, Business Implementation). If the project uses a central risk and issues log, raise any significant ones onto that to start to get visibility and sponsorship.

Summarise the risk. Be specific - refer to the impacted stakeholder group and the process area / service impacted.

Area	Issue	Issue Type	Resolution	Project Work-stream for Resolution	Owner of Action
All	A Governance Structure for Project and Business Stakeholders is required to be set up in order to encourage Business Managers and Business Leaders to buy in to and support the SAP programme and to gain the necessary input and to build a decision making forum	Stakeholder Communication	Use the Library of Options to determine which approach may be suitable for engaging Business stakeholders. Once decisions have been made set up the governance structure	Sponsorship	Programme Manager
All	There needs to be a way of maintaining regular contact with stakeholders in order to obtain their buy-in and then to increase and maintain their support levels to the SAP project	Stakeholder Communication	Set up regular meetings with Business Leaders / Managers regarding SAP progress and transition in order to maintain pro-active engagement activity within the SAP programme.	Sponsorship	Programme Manager
All	All employees will be responsible for updating personal details on SAP Employee Self Service. This change needs to be communicated and employees need to understand the impact of changes to their personal details and how to manage them, i.e., from informing somebody of any changes by telephone / e-mail to actually entering changes personally. Employees need to be aware of cut-off dates for bank detail changes for payroll run purposes	Task change	Change Team to ensure this is communicated to all Business users who will perform the role via Employee Self Service, via role-based materials	Job Roles Communication	Change Team

Any major organisational or HR risks should be highlighted as high priority and flagged early

Categorise the risk in terms of the type of intervention required to address it

Outline the specific change activity required to address

## **CHG 3 - PUBLISH A GREAT CHANGE PLAN**

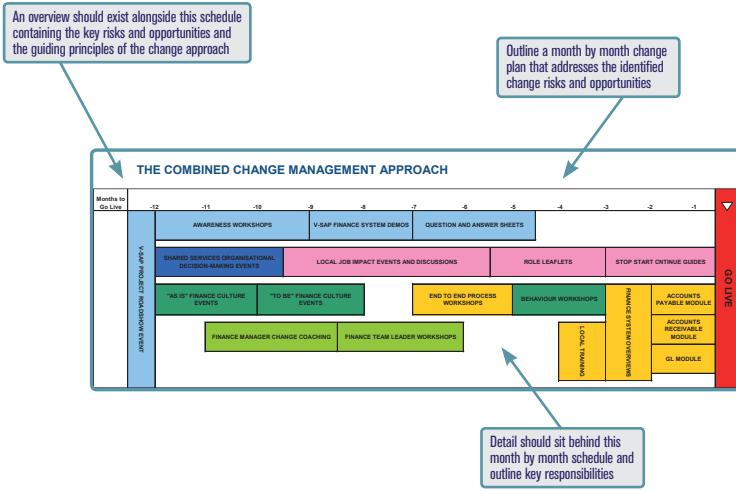
### **IT'S BETTER TO HAVE A SIMPLE, EARLY PLAN THAN AN UNFINISHED MASTERPIECE**

As a change practitioner, you can easily get bombarded with risks, opportunities and decisions at the start of the project. You can either constantly respond to these in a never ending cycle, or take some time out to put a plan together early, and start engaging those who understand the future state processes / services, the impacted businesses, and change resource providers early. Lots of discussion and engagement around a simple plan is better than building a complex plan in a closed room that only you understand.

**CHG 3** - For each of the 5 areas outlined in this guide, create a discussion document which outlines the key change risks and opportunities, the objectives and key outcomes of the work, the guiding principles that will drive the work, and the broad change activities. The plan needs to be the basis for conversations with impacted businesses about what will be covered, with subject matter experts to discuss the role that they will need to play, and solution providers including HR and Learning providers.

## THE CHANGE PLAN

The change plan is the one place 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.



## PROCESS CHANCE

### THE 3 ACCELERATORS FOR GREAT PROCESS CHANGE

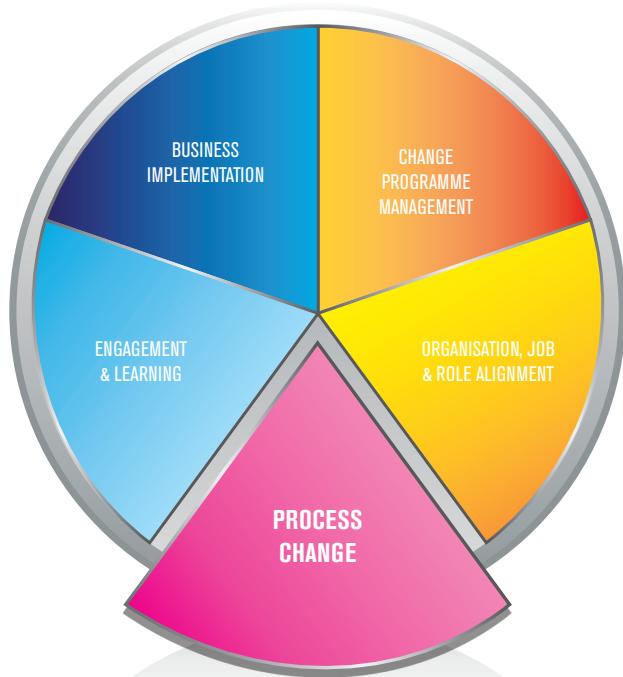
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*PRO 1 – Set the standards for the process work*

*PRO 2 – Create great formats to get people involved*

*PRO 3 – Implement the process changes*

## PROCESS CHANGE



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## **PRO 1 - SET THE STANDARDS FOR THE PROCESS WORK**

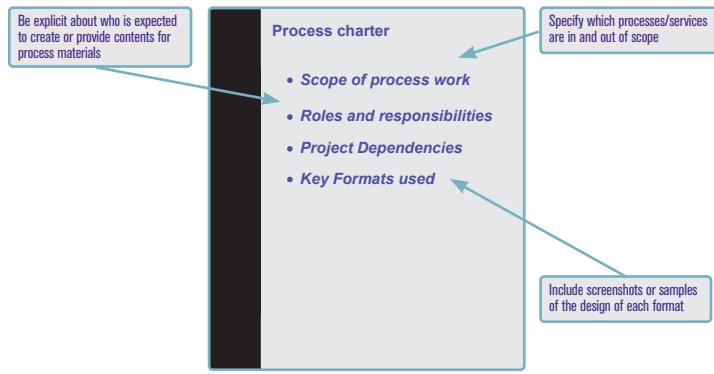
### **CLEARLY DEFINE WHERE PROCESS WORK WILL ADD VALUE**

Process work should only be conducted where it will add value. Processes are a raw material for many of the change activities, and in a complex project, there will be many people who need process formats. Defining which processes are needed for a project, who is developing and using them and what the formats are can save a lot of time.

**PRO 1** - Create a charter document that outlines which process formats are needed by which people, and which formats will suit their needs. If there are dependencies, make it clear what they are. For example, in a technology project, some of the process design documents will need to be signed off before testing and training materials are needed. You may need to include a diagram which shows how all the types of process information fits together.

## PROGRAMME PROCESS CHARTER

The programme process charter provides a one page view of which processes need to be mapped, presented and which formats shall be used. It also details who will do what and identifies prerequisites and dependencies.



## **PRO 2 - CREATE GREAT FORMATS TO GET PEOPLE INVOLVED**

### **USE RELEVANT FORMATS DURING THE PROJECT AND THE IMPLEMENTATION**

We often form teams of people who shut themselves in offices and create technically brilliant representations of processes and procedures. Sometimes processes have to be presented in a certain format to meet a legislative or technical need, but more often we waste the time that we spent developing them because the formats do not work for the audiences.

**PRO 2** - In some of the other accelerators we use formats which map processes to the impacted businesses. This is a key tool for organisation and job activities, but it can also be used to show where different process formats should be used for different audiences. For any processes that are needed during the project, call a meeting with all the project team members that need processes to agree what standards will be used. For end user materials, involve people from the businesses to select relevant and usable designs.

# PROCESS SCOPE PLANNING DOCUMENT

The activity to people matrix is a great tool for making change management decisions but can also be used to identify which process formats should be developed for which audiences. This takes the high level view from the charter and drills down to the fine details as needed.

Process Scope Planning Document Version 1.0	Scope of work		Time		Current Responsibilities												
	Process Model Ref	Standardisation of scope	Risk & Controls ref	ESCR Scope	Time - current	Time - Should spend	Business Team	Commercial Team	International Team	AP Team 1	AP Team 2	Overheads	Direct	Indirect	Expenses	Payments	Reporting
<b>Procure to Pay</b>	Requirement of Goods or Services	Receipt of Goods or Services															
	Process Supplier Invoices	Process Supplier Payments	Procurement Accounting	Maintain Vendor Master File													
<b>Bill to Cash</b>	Billing	Manage Collections Process	Process Receipts	Customer Accounting	Controls	Debt Reporting											

Seek clarity on who will create contents for process formats for which scenarios or sub-processes

## **PRO 3 - IMPLEMENT THE PROCESS CHANGES**

### **EMBED VISUAL AND PRACTICAL TECHNIQUES INTO THE BUSINESS TO DELIVER THE CHANGES**

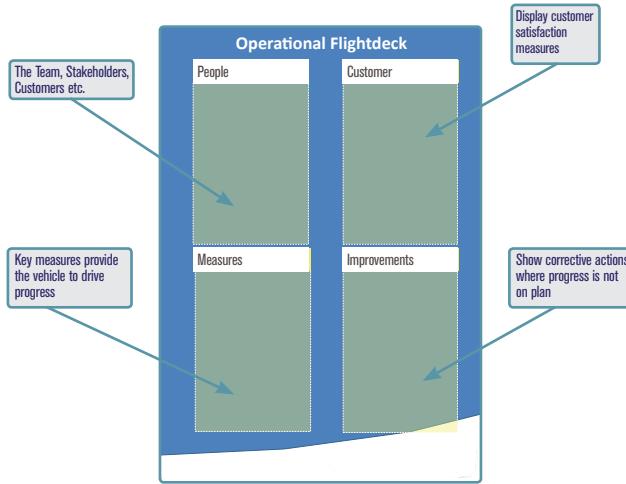
The previous stages identify what needs to be changed and how the change should be implemented. The final part of the jig-saw is to ensure that the plans are put into place and the benefits are realised. Flightdecks can be used to provide visual and practical displays in the business areas impacted.

**PRO 3** - Construct a four panel flightdeck for use as a central point for visitors and as a focal point for team meetings. The flightdeck should focus on team members, to show any relaunched structures, customers to focus on satisfaction levels, measures to focus on team KPIs and operational improvements. This information is a key part of any business as usual team, but can be used as a mechanism to feed in status improvements.

Set up a team meeting daily or weekly using the flightdeck as the main focal point. This will ensure that the flightdeck is maintained up to date and that all team member know what is going on.

## THE FLIGHTDECK

Flightdecks provide “at a glance” visibility of overall operational team structure and implementation progress, including highlighting of any issues and the corrective actions that are being taken. They provide a great focus to on the new ways of working after a Go-Live.



## **ORGANISATION, JOB AND ROLE ALIGNMENT**

### **KEY ACCELERATORS FOR ORGANISATIONAL OR ROLE DESIGN**

Use these five accelerators when you need to re-design any part of the organisation structure or any of the job profiles within it

*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*

### **KEY ACCELERATORS FOR JOB AND ROLE ALIGNMENT**

Use these five to understand the impacts of a journey on the organisation structure or the jobs and roles within it.

*JOB 1 - Identify major HR and org Impacts*

*JOB 2 - Conduct a job impact analysis*

*JOB 3 - Plan and monitor business and HR actions*

*JOB 4 - Engage leaders to deliver actions for key roles*

*JOB 5 - Make the changes and educate key roles*